IS01

Integrated Enterprise Management Program (IEMP)

Service Request System (SRS) User Guide

REVISION B

Distribution IEM internal only

DOCUMENT HISTORY LOG

Status (Baseline/ Revision/ Canceled)	Document Revision	Effective Date	Description
Baseline	1.0		Baseline Release
Revision	1.1		Rewrite to include Remedy v5
Revision	1.2		Updated to include changes in Application
Revision	1.3		Updated to include changes in Application
Revision	1.4	January 2006	Updated to include changes in Application
Revision	1.5	May 2006	Updated to include changes in Application
Revision	1.6	October 2006	Updated to include changes in Application and added change log
Revision	A	May 18, 2007	Updated Appendix for ABPS documentation and formatted to new standard
Revision	B	10/31/2007	Updated screenshots to incorporate changes to system. Deleted unnecessary sections beyond scope of document. Clarified verbiage.

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1.0 Service Request Process – An Overview

The IEM Competency Center uses the Remedy tool used to report, track, approve and document Discrepancy Breaks/Fixes and Change Requests (CR) in all IEMP systems and was created from multiple systems (consolidated into one) to provide the client and support team one (user friendly) tool for job request, problem management, and change management.

This system can be accessed by all IEMP Competency Center Remedy users, technical and functional support personnel.

The IEM Help Desk structure is listed below. The Competency Center is considered Tier 2 support and provides support to each center's local Help Desk.

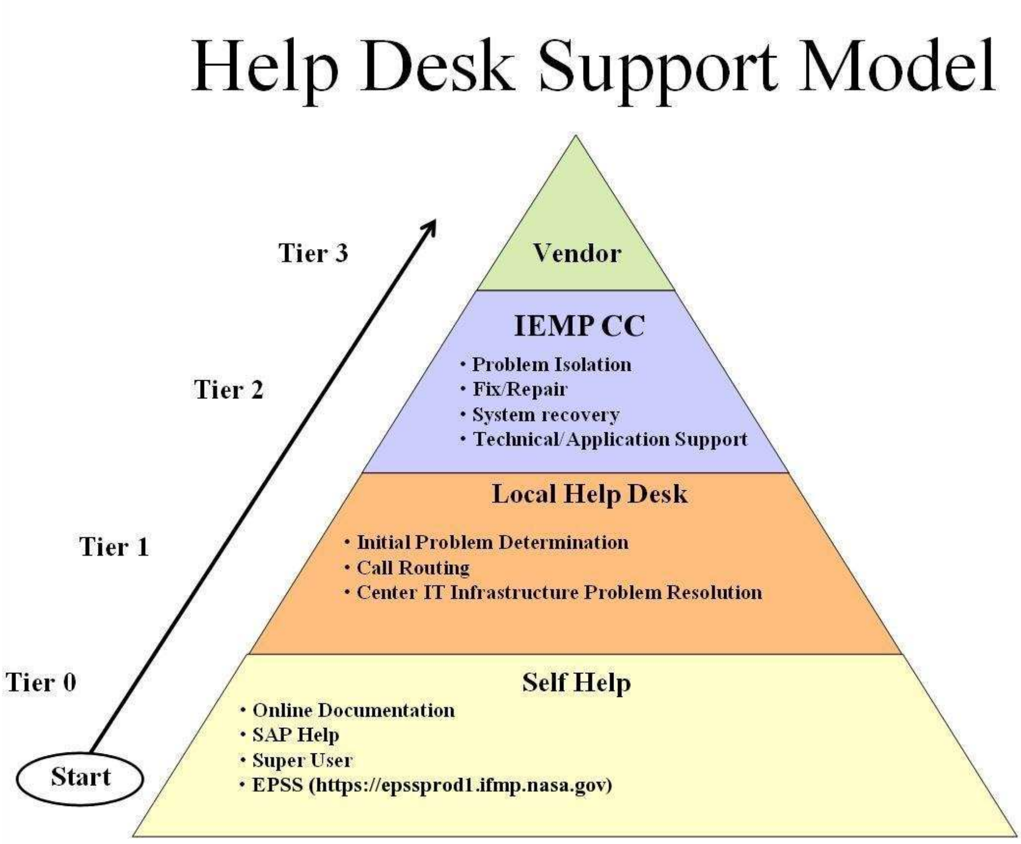


Figure 1 – Help Desk Support Model

1.1 Definitions

The following definitions will be used throughout this document.

- Availability – refers to the time during which users are able to access the IEMP Systems and perform work.

Service	Applicable Definitions	Standards
Availability Requirements	Standard Business Hours Typical Online business hours: 0600 – 1900 (CT) Monday - Friday	Time during which users are able to access the IEMP systems and perform work.
	Non-Standard Business Hours: 1900 – 2400 (CT) Monday – Sunday	Time during which users are able to access the IEMP systems and perform work. User accessing the system during the batch processing window may experience less than optimal response times.
	Prescribed hours for Backups: Incremental: 2400 – 0400 Monday – Sunday (typical)	The application will be available during this time for online users, albeit in lower performance levels
	System Maintenance Windows: 0400 – 0600 (CT) Wednesdays 0400 – 1200 (CT) Saturday 0400 – 1400 (CT) Sunday	Times that have been designated as the window during which the application might be unavailable on prior notice for weekly backups, ongoing preventive maintenance, application updates, etc.

- Reliability – refers to the average time between service interruptions
- Performance
  - IEM System response time – IEMP System transaction processing time measured from the time the transaction is received at the IEMP firewall until response is returned to the IEMP firewall
  - End-to-End response time refers to the total user wait time after submitting a transaction and receiving a response or completion
- Recoverability
  - Recovery Time Objective – time required to restore service
  - Recovery Point Objective – historical point in time the system is restored, when returned to service

Each Service Request requires the IEMPCC to expend measurable effort to provide responses. The following primary classifications are available for a Service Request.

- **Discrepancy Break/Fix -** a defect or failure in an existing system. Report of a discrepancy wherein a baselined product does not properly reflect or operate in accordance with its specifications. If the statement, "It was working yesterday, but isn't today" applies, it is a discrepancy break/fix. Each discrepancy break/fix should include the following information:
  - Name, Phone Number, Email Address, PC or MAC, ID
  - Has user contacted Super User or consulted online help (EPSS https://epssprod01.ifmp.nasa.gov/)
  - IEMP Application , access via Client or Web
  - IEMP Client, Role, Transaction.
  - First time user, first time performing function/task in IEMP
  - Provide a screen shot of the error message,
  - If no error message, provide full details of the problem.
- **Change Request (CR) -** a change (addition or enhancement) to a Product's baseline specifications.
  - Types:
    - User Enhancement
    - Performance/Design
    - Regulatory
    - NASA Policy
- **Master Data (MD) -** sites, vendors, customers, pricing control and other master records retrieved when business transactions are processed.
- **Job Requests -** a routine task performed to maintain system stability, as well as other miscellaneous requests not requiring an assessment

With each type of service request, there are certain expectations for completion and system availability. These values are maintained in the IEM Service Level Agreements (SLA's), but are listed below for reference.

Severity 1 – Immediate and total loss of application accessibility. *Example: System down*	95% of Severity 1 problems resolved within 4 hours. 100% of Severity 1 problems resolved within 8 hours.

Severity 2 – Significant loss of critical business functions. *Example: Users at a center unable to access an application*	90% of Severity 2 problems resolved within 8 hours. 100% of Severity 2 problems resolved within 16 hours.

Severity 3 – Partial loss of critical business functions for multiple users *Example: Users unable to print*	90% of Severity 3 problems resolved within 24 primary business hours. 100% of Severity 3 problems resolved within 48 primary business hours.

Severity 4 – Partial loss of critical business for functions for individual users *Example: User password rest*	90% of Severity 4 problems resolved within 5 business days.

Master Data – Emergency	90% of all Emergency changes will be resolved within 1 business day.

Master Data – Routine	90% of all Routine (including High, Medium, and Low) changes will be resolved within 2 business days.

1.2 Processes

The overall Service Request Process can be illustrated using the following diagrams. Each type of Service Request (SR) processed by the IEM Competency Center follows a preconfigured and defined path. Below are charts illustrating each basic type of SR.

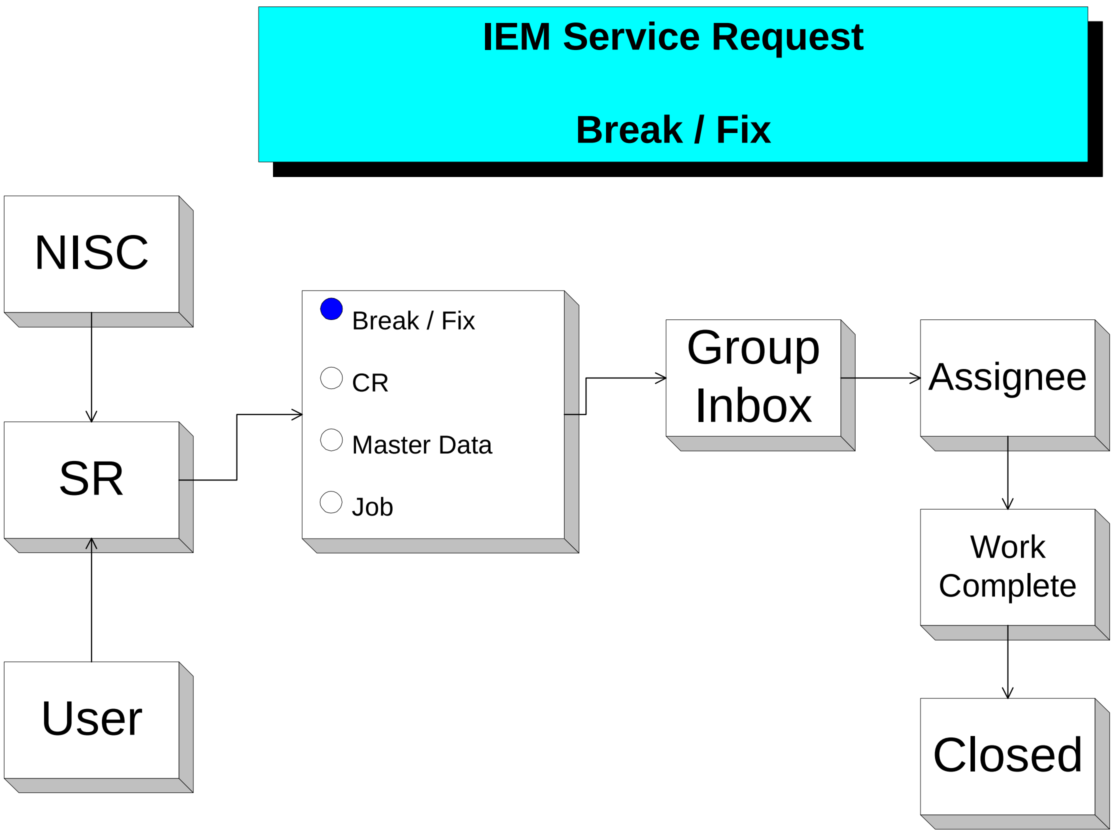


Chart 1 – Break/Fix

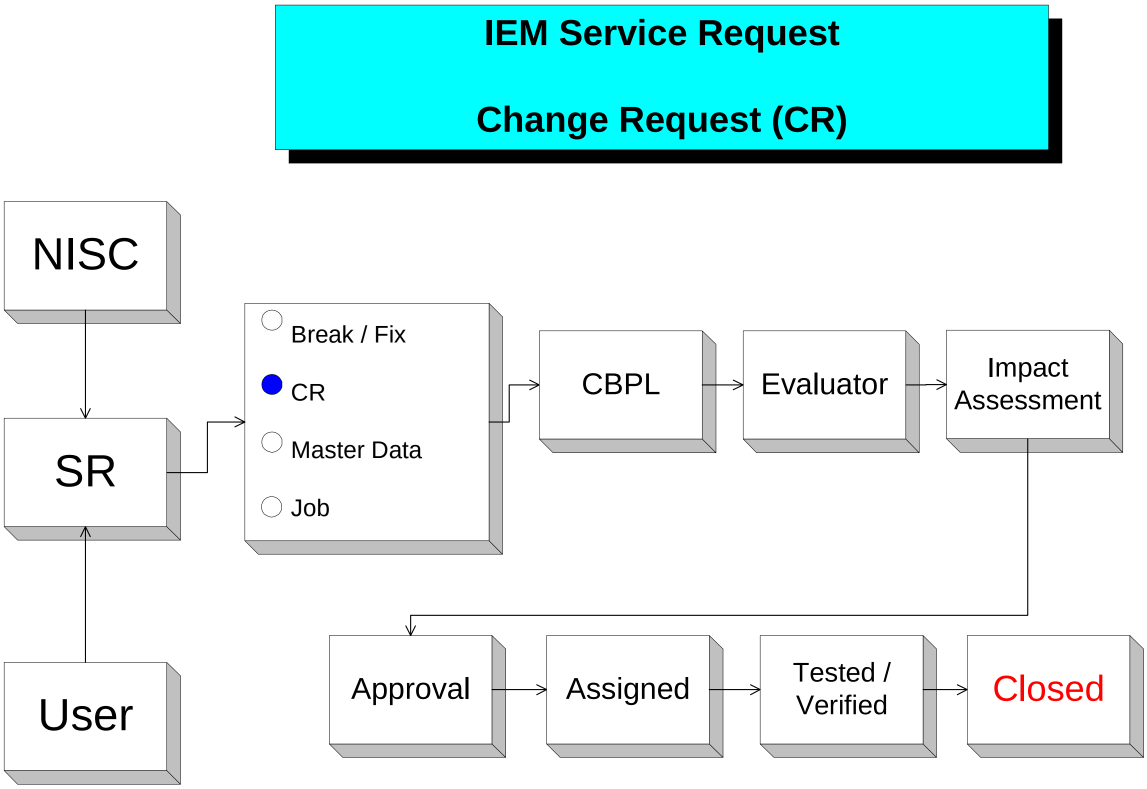


Chart 2 – Change Request

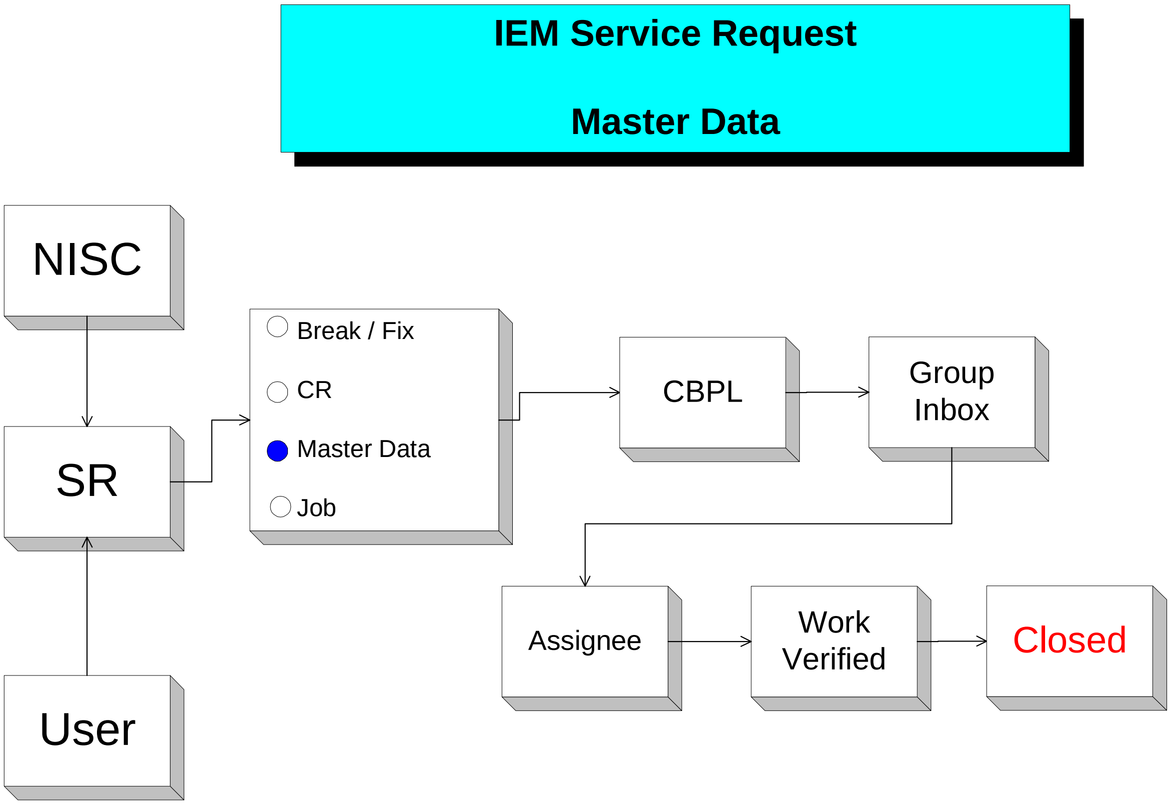


Chart 3 – Master Data

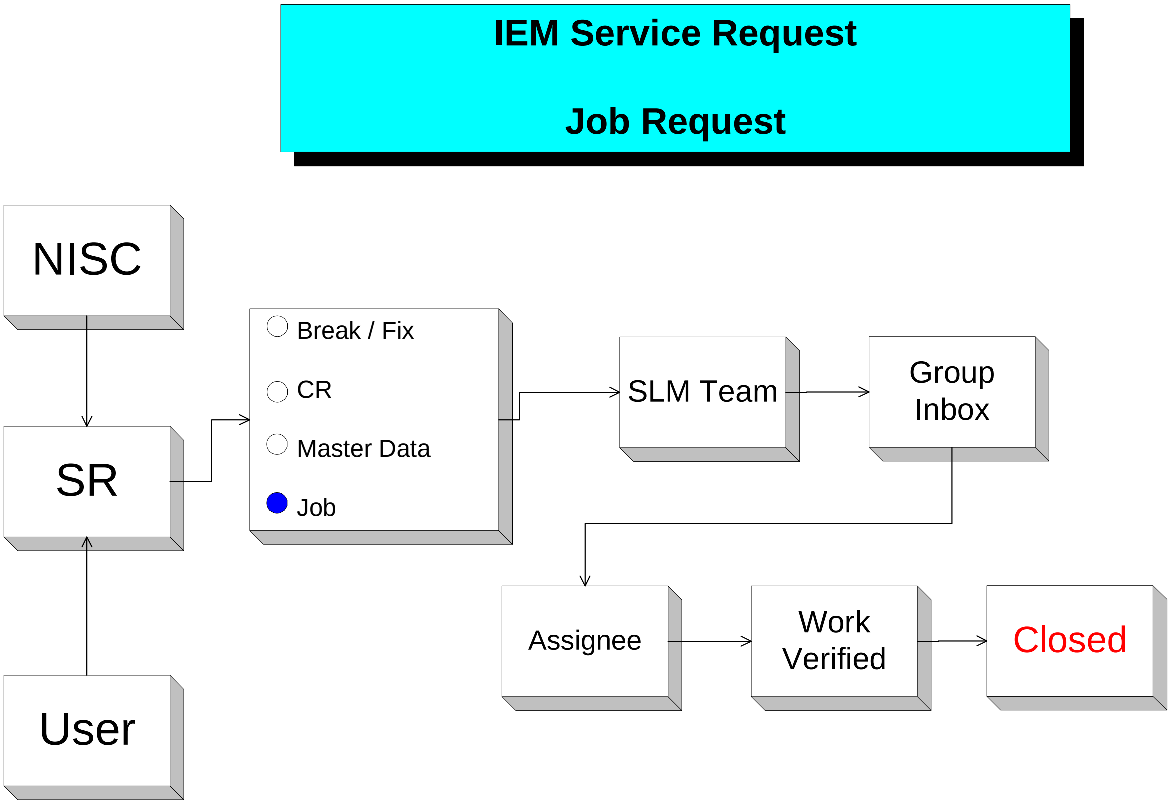


Chart 4 – Job Request

2.0 Logging in to Remedy

1. Launch BMC Remedy User from the icon on your Desktop or the Start - Programs Menu.

Figure 2 – Icon

If the BMC Remedy User icon is not in one of these locations, you can start it from the folder where Remedy was installed (usually C:\Program Files\AR System\User). If you need to install Remedy, go to http://remedy.msfc.nasa.gov to download the application and installation instructions. The latest version, as of this revision is 7.0.1 Patch 003.

Remedy may also be launched using the Citrix interface. However, a separate Citrix account will be required.

2. At the login prompt, enter your *User Name* and *Password* then **click OK**.

If you do not have a Remedy account, you must request an account through NAMS at https://nams.nasa.gov following the procedures available there. When requesting the account, be sure to request ***MSFC0005 ISRS*** access to get to the IEM Service Request System.

2.1 Password Directives

When establishing a new password or changing your password, be sure it conforms to NASA IT Security directives, guidelines, and regulations.

2.2 Changing Passwords

When your password expires, Remedy will automatically prompt you to change your password (see Figure 2). Enter your new password based on the criteria specified, then click the *Save New Password* button.

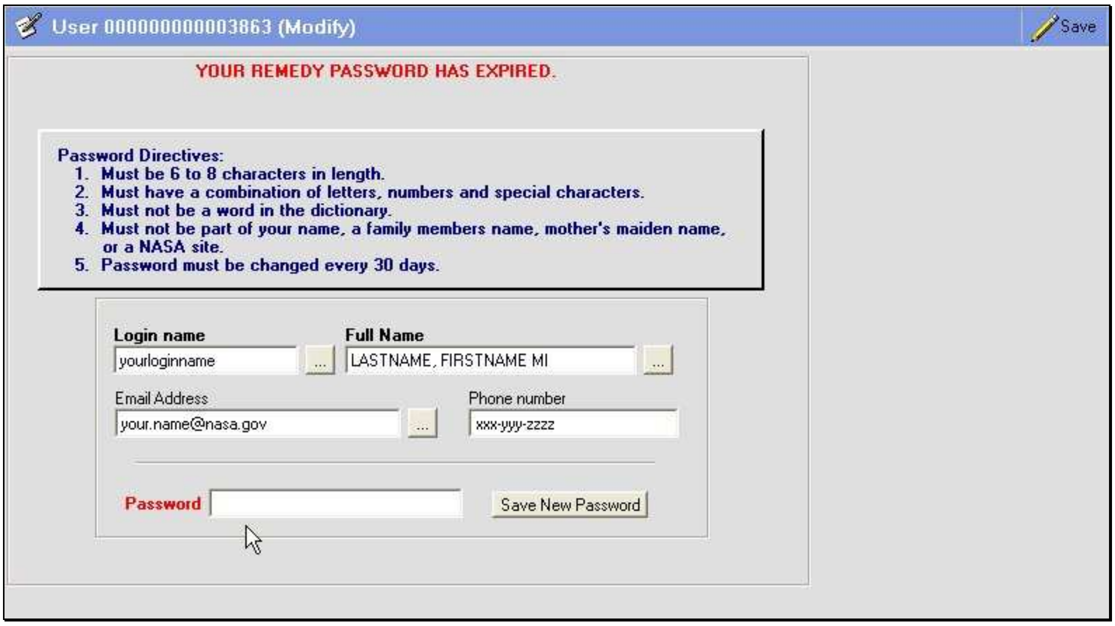


Figure 3 – Password Change screen

You may also change your password at any time by using the Change Password link on the IEM Service Request form.

3.0 Customizing Your Remedy Account

The following section is helpful to make Remedy easier and faster for you to use. These items are not required, but make Remedy configurable for your needs.

3.1 Adding a Favorite

You may mark forms you will be using on a regular basis as a favorite, which will make them easier to locate in the future. To mark a form as a favorite, follow the steps below.

1. **Select File/*Open*** from the Menu bar or **Open** from the Toolbar.
2. Highlight the form you wish to make a favorite by using the left mouse button.
3. Right click on the form and select Favorite (you may also press CTRL-F to do this).

These steps are illustrated in the next figure.

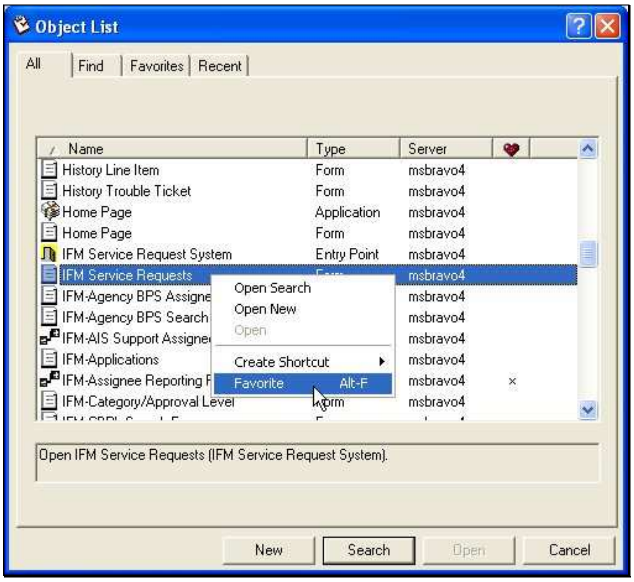


Figure 4 – Adding a favorite

Once you have added all your favorites, you can see them listed by selecting the Favorites Tab from the Open Window.

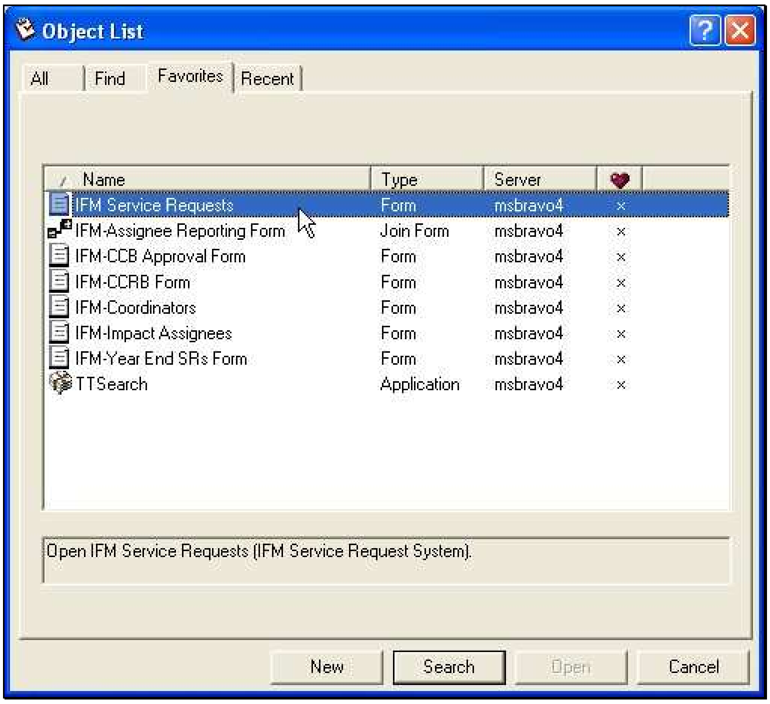


Figure 5 – Favorites List

4.0 Opening a Search Form (Basic)

A Service Request (SR) is a general term for an entry into the IEM Service Request System. SR's can be broken up into several categories, which are discussed in more detail in the section entitled "Creating a new Service Request".

You may see a page like this when you log in:

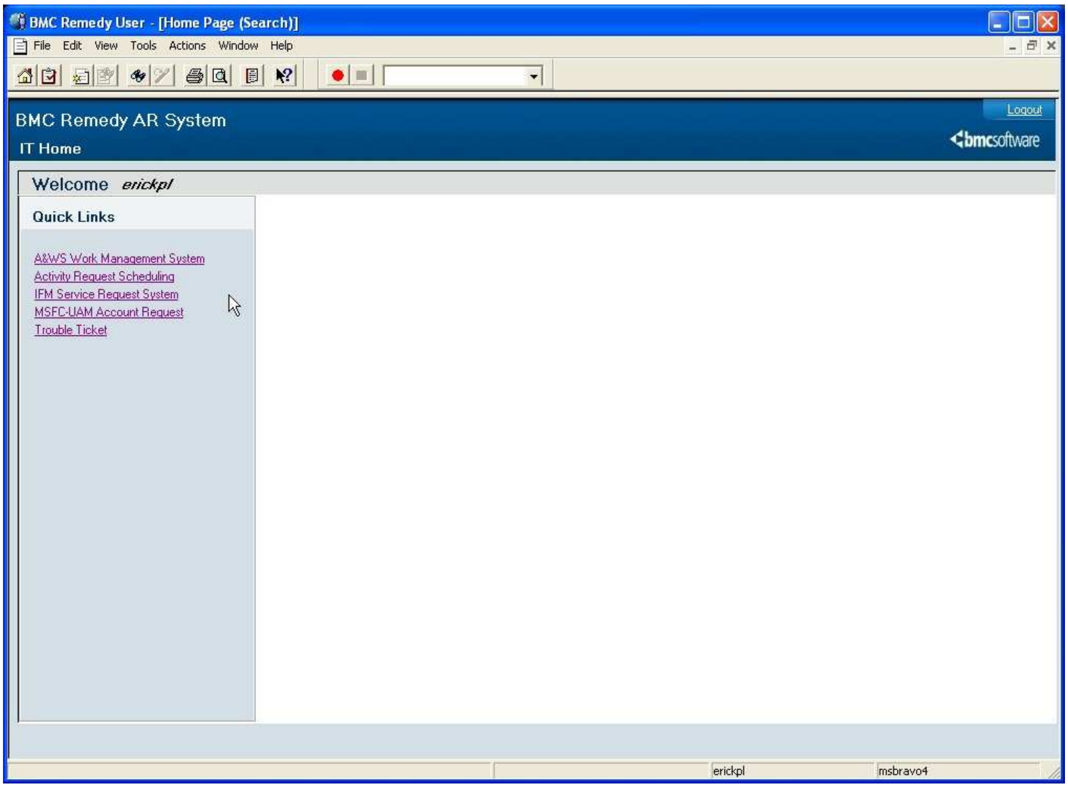


Figure 6 – Home Screen

If you, you can simply click on the form (if listed), and it will open a search function. However, if the form you need to open is not listed, follow the steps below.

1. **Select File**/**Open** from the Menu bar or the ""Open" button  from the Toolbar.
2. To access the IEM Service Requests, **select** "IEM Service Requests"' from the **All** tab and **click** the **Search** button at the bottom of the Open window.

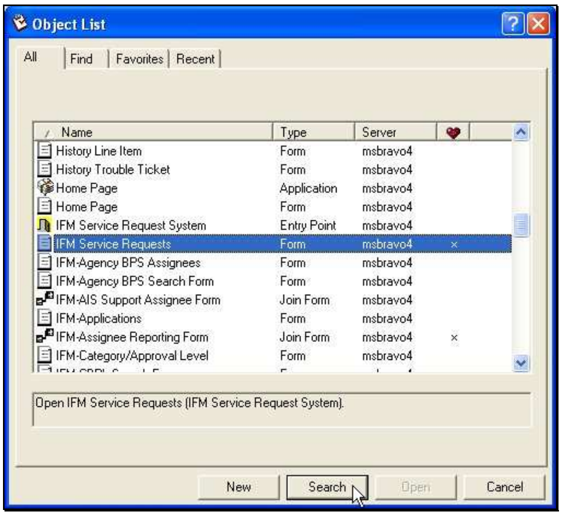


Figure 7 – Open Window

3. The IEM Service Request form opens in a Search window. Note here, you can easily change this to a New ticket by clicking the button or by pressing your F2 key. The Search screen will transform to a new SR screen. There is more information about creating a new ticket – refer to section 8.0 entitled **Creating a NEW Service Request**.

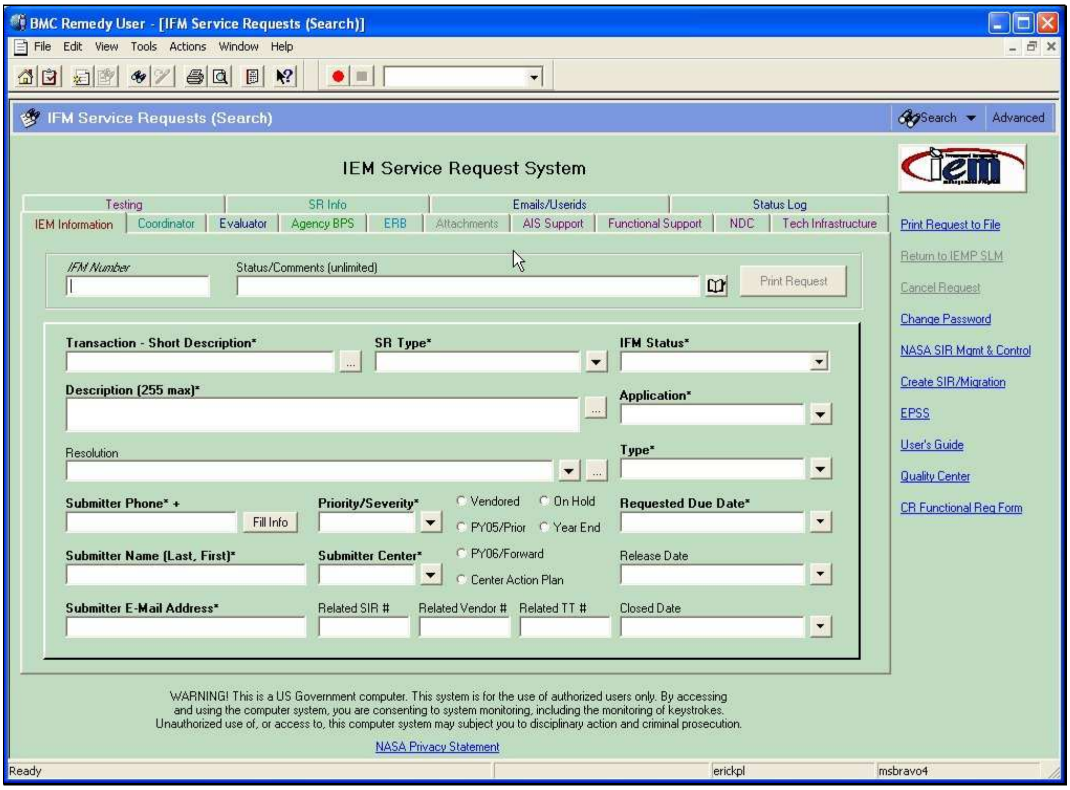


Figure 8 – IEM Service Request Form (Search)

5.0 IEM Service Request Form

The IEM Service Request form is the primary form used by IEM to track Service Requests. The fields in the IEM Service Request Form are divided into areas or tabs. The following tabs are available:

Tab	Purpose
IEM Information	Basic, essential information regarding the ticket
Coordinator	Used by the SLM team for customer follow-up
Evaluator	Used to send SR out to various teams for impact assessments, as well as define the 'owner' of the SR who is responsible for SR analysis
ERB	Used by the Engineering Review Boards for review and approval
Attachments	Used to attach documents in support of this SR
Agency BPS	Used by Agency Business Process Support Team
AIS Support	Used by the Interface teams, Application Development, and Business Warehouse
Functional Support	Used by support personnel for the various applications
NDC	Used by the NASA Data Center
Tech Infrastructure	Used by technical infrastructure personnel
Testing	Used to status testing (when required)
Emails/User IDs	Lists emails and user IDs for a particular SR
Impact Emails	Lists emails for groups who do impact assessments for an SR
SR Info	Used by Customer Relations Management for additional items that may need to be altered or actions performed as a result of the SR

Each tab is illustrated in Appendices A through O. Each tab has unique fields on it. Instead of defining each field here, Remedy has a feature to allow the user to get an explanation of what each field does. By clicking the Select Help button () you can use your mouse to click on any field and get a detailed explanation of what its function is. See the figure below.

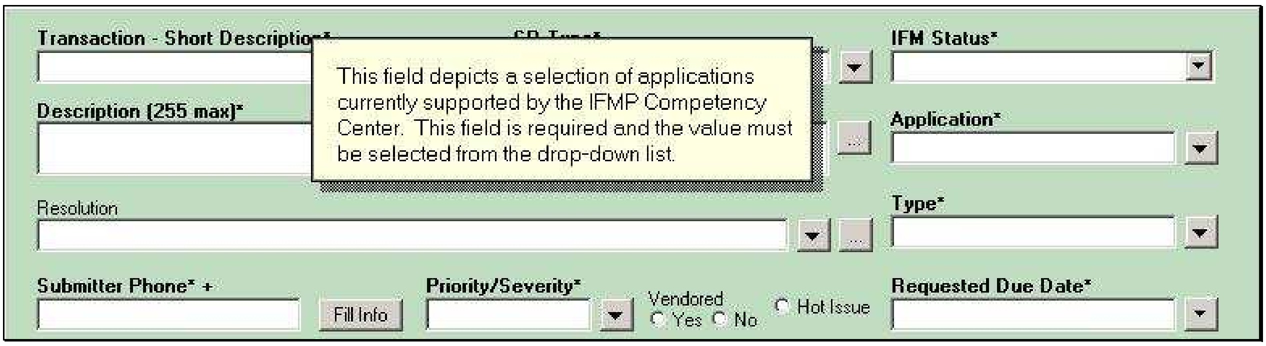


Figure 9 – Clicking a field name shows help

6.0 Viewing an Existing Service Request

1. **Select File/*Open*** from the Menu bar or  **Open** from the Toolbar.
2. **Select** 'IEM Service Request' and **click** the **Search** button.
3. If you know the SR number, enter the number in the *IEM Number* field then **press** the Search button in the top right corner. You may also search by any of the other fields on the screen.

Note: the Diary field is **not** indexed, and searching from this field is NOT recommended.

Depending on your role, you may or may not have access to or see all of the possible tabs. Should you be using the web interface, Appendices A through N give a very brief explanation of the fields. Another document details the web interface for Remedy.

6.1 User role-independent Tabs

Below are the tabs that are always displayed, regardless of user role:

- IEM Information
- Evaluator
- Attachments – A grey label means there are no attachments; A red indicates attachments are present
- Testing – Will display only if testing is required for that particular SR

6.2 User role-dependent Tabs

Below are the user-level specific tabs that display based on user type:

- Coordinator – only visible to the SLM Team
- Agency BPS
- AIS Support
- Functional Support
- NACC
- Network Engineering
- Tech Infrastructure
- Emails/User IDs – only visible to the SLM Team
- Impact Emails – only visible to the SLM Team
- SR Info

7.0 Modifying an Existing Service Request

1. **Select File/*Open*** from the Menu bar or **Open** from the Toolbar.
2. **Select** 'IEM Service Request' and **click** the **Search** button.
3. Enter the service request number (or other search criteria) then **press** [Enter] or the Search button in the top right corner.
4. Place your cursor in the *Status/Comments* field (commonly referred to as the Diary), which is located at the top middle of the **IEM Information** tab, and then begin typing.

Figure 10 – Status/Comments (aka Diary)

NOTE: Click on the button to the right of the *Diary* field to expand the field size. This displays the Diary History and the Diary Editor.

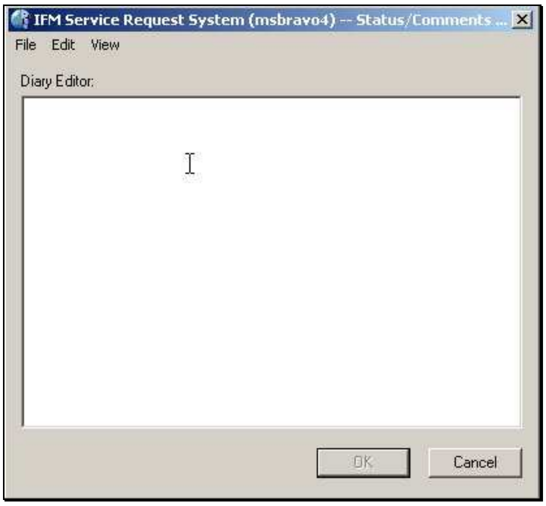


Figure 11 – Expanded diary entry

This field is an unlimited text field and is commonly used to document actions or other items of note for a particular SR.

5. **Click the Save button** in the upper right corner of the window to save the changes. Your user ID, date, and time, will be entered and saved.

NOTE: Once saved, Diary entries **MAY NOT BE DELETED.** Use caution and review your entry prior to saving to ensure appropriate entries are made.

8.0 Creating a NEW Service Request

In order to track fixes made to IEM systems, SR's need to be created. IEM Users have the ability to create Service Requests for actions they are requested to perform to fix a problem or to create an enhancement/change to the system. These are all tracked by Remedy.

A Service Request is any request coming into the IEM Service Request system, but can be broken down into one of the following categories:

- **Break Fix/Discrepancy** – defined by the statement, "It worked yesterday, but not today."
  - Discrepancy (Break/Fix) – problem
  - Change Request / Discrepancy – a problem that requires a system change to fix
- **Change Request (CR)** – a change (addition or enhancement) to a Product's baseline specifications.
  - Types:
    - User Enhancement – "I want it to do this" or "I want the screen blue"
    - Performance/Design – Changing system configuration, infrastructure, servers, etc
    - Regulatory – Government policy directs NASA to do it a certain way
    - NASA Policy – NASA management requires things to be done a certain way
- **Master Data** – sites, vendors, customers, pricing control and other master records retrieved when business transactions are processed.
- **Job Request** – a routine task performed to maintain system stability, as well as other miscellaneous requests not requiring an assessment.

8.1 Priorities and Severities

Each Service Request can be given a severity level. For Break/Fixes, a numeric scale is used (detailed in Section 1.1). Severity 1 and Severity 2 issues can only be opened by the NASA Information Support Center (NISC) or by a Center Business Process Lead (CBPL).

Severity Level	Meaning / Criteria
1	Entire system down. Agency impact.
2	Major functionality down or severely impaired. Most users impacted.
3	Group of users affected, such as a functional area, building, etc.
4	Individual users affected

For Change Requests, a different scale is used.

Severity Level	Meaning / Criteria
Emergency	Needs immediate attention
High	Needs attention quickly, but not quite an emergency.
Medium	Needs to be done fairly soon, but not critical.
Low	No specific timeframe or requirement.

The following procedure for opening a Service Request is a basic overview. Specific values and descriptions will vary depending on the issue being detailed. Where possible, specifics will be noted.

1. **Select File/*Open*** from the Menu bar or  **Open** from the Toolbar.

2. **Select** 'IEM Service Request' and **click** the **New** button.

3. The screen shown will look similar to the Search screen mentioned previously. However, if you check the action buttons across the top of the Remedy window, you should see the icons below. This is an indicator that the form you are viewing is for entering a NEW Service Request.

Visual Indicators that a NEW Service Request is being created.

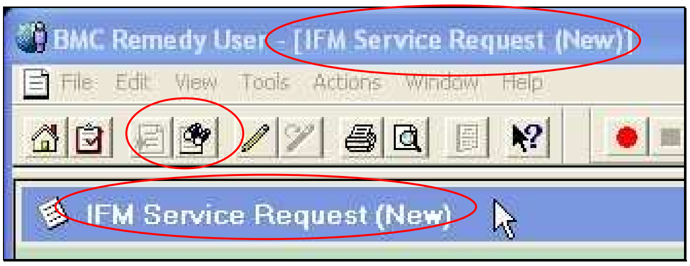


Figure 12 – New SR Indicators

4. NO SR number needs to be entered – it will automatically generate. Fields that are labeled in bold lettering and have the * are required for SR entry.

5. The submitter information should automatically be entered when you select NEW, but if any of the submitter information is incorrect, it can be updated. The Submitter Center needs to be provided as it is not entered when opening a new service request.

   NOTE: For Competency Center users, use IEMP CC as your center.

6. Optional fields are not required for opening an issue, but can provide good information regarding the issue. Related SIR # and Related Vendor # provide a space to enter related ticket information if the ticket did not originate here or if the ticket was dispatched to a vendor for resolution. Related TT# will not need to be entered as it is only used when a ticket is sent to the Competency Center via the NISC (NASA Information Support Center).

7. Before you click the 

button, ensure that an entry is made in the Status/Comments field. This information is recorded in the diary. Once entered it cannot be removed. Entering just basic text does not provide a detailed history of the issue, so descriptive entries here are preferred. The field is limitless in size, so enter as much information as required.

8. The Attachments Tab provides a place to attach documents that further help document the issue. Simply click on the Add Attachment button. Any file type may be attached, including Word, Excel, PowerPoint, JPG, etc; HOWEVER, file size is limited to 1MB bytes and all files shall sum up to less than 10 MB.

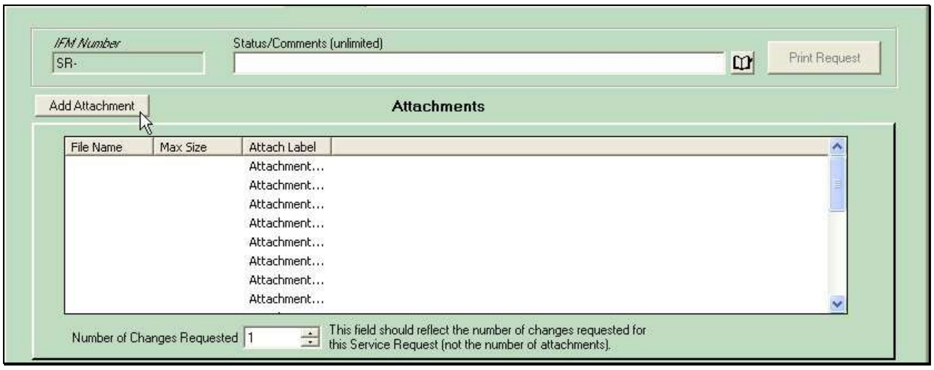


Figure 13 –Attachments

9. Once a document is attached, be sure to specify the number of changes in the provided field. The value MUST be set to at LEAST 1, which is the default. If the request will require multiple changes, edit this number accordingly. For example, a Master Data request may be only one Service Request, but it may need to be performed in 20 locations. In this instance, enter 20 for the number of changes requested. The maximum number of changes that can be requested is 9999.

Figure 14 – Attachment made with *1* change

10. Once all fields are entered, click the 

to initiate the processing. You will be given an SR number via a popup like the one shown below.

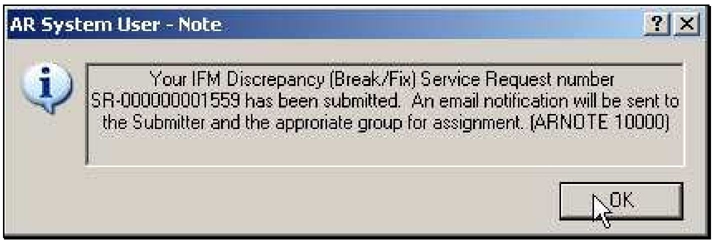


Figure 15 – Successful SR Submission

For more information on SR workflows, please see Remedy User Guide, available from the hyperlink in Remedy.

9.0 Closing a Service Request

A service request must have all the affected tabs marked as completed/closed and the *SR Status*: must be “Pending Closure”. When all actions have been completed, the Remedy flow should mark items Pending Closure.

Notification is then sent to the SLM team, where each break/fix is examined to ensure all information required is complete. A follow-up call is also placed to the SR originator to ensure that the break/fix was completed to the originator’s satisfaction.

For Master Data and Job Requests, once work on the request is marked as complete, it is marked as Closed. No further action is required.

Change Requests are marked as closed once they are moved to production.

10.0 Dispatching a Service Request to Another Organization

Oftentimes, an organization needs to participate in resolving a Service Request, but is not initially included.

To reassign or to include another organization in SR resolution, follow the procedure outlined below. Keep in mind that this process may vary a bit on a case by case basis. For assistance with this, please contact an SLM team member.

1. **Select File/*Open*** from the Menu bar or  **Open** from the Toolbar.
2. **Select** ‘IEM Service Request’ and **click** the **Search** button.
3. Enter your search criteria and perform the search.
4. **Click** the Tab to which you have access (AIS, Technical, etc).
5. Select the desired organization from the dropdown list of assignees.

   You may be prompted with a window asking if future assignments are needed. If you answer yes, the tab you are using will stay open. If you respond no, the tab will be marked as closed and no longer available.

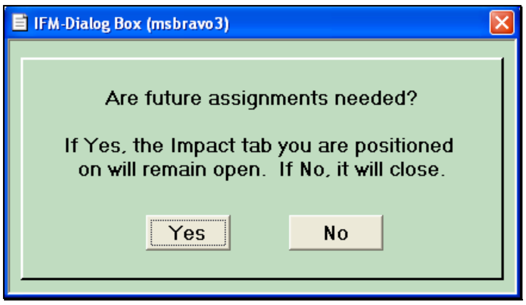


Figure 16 – Future Assignments

6. Enter a description as to the nature of this change in the diary.
7. **Click** Save in the upper right corner of the window to save the changes.

Appendix A – IEM Information Tab

All screen shots in this appendix are based on the SEARCH version of the tab. Users who connect to Remedy via the Remedy software can click the Select Help Button for more information. Web users can use this appendix for field definitions.

While every effort is made to keep the definitions accurate between this document and Remedy, please refer to the Remedy client for the most up to date definitions

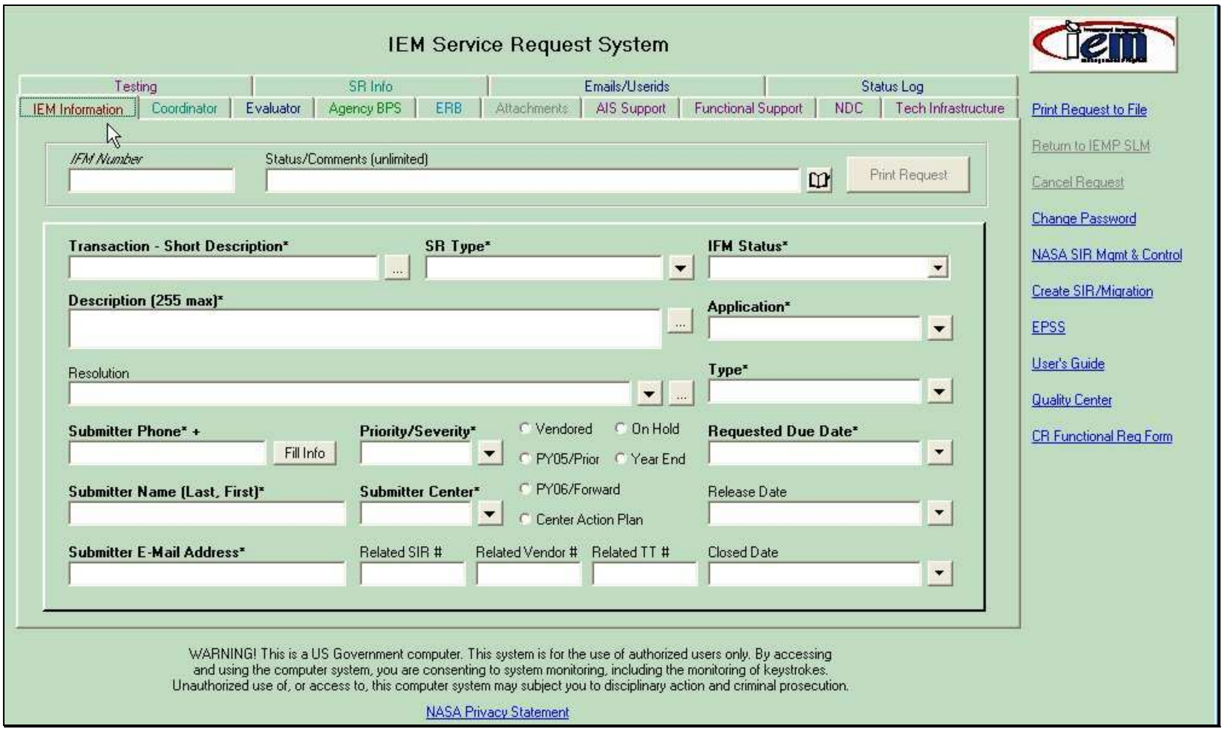


Figure A – IEM Information

Field Name	Description
IFM Number	Auto-generated number identifying the Service Request. This field can be entered in search mode only.
IFM Status	Auto-set field based on actions in the SR. SLM Team can change this if necessary.
Status/ Comments	AKA the Diary. When statuses or updates are needed for an SR, data can be entered here. You can also click the diary button for a larger field. This field is unlimited in size. Any information regarding ticket

	status should be placed in here.
Transaction – Short Description	Short description of the problem. If an SAP problem, the t-code can be put in there as well.
SR Type	Type of request. See page XXXX for an explanation of each type.
Description	More elaboration on the issue. 255 characters max.
Application	Program or system having the issue. Question to ask, “What’s hurting?”
Type	Particular area of the application above having an issue. Question to ask, “What does the pain feel like?”
Resolution	Ultimate solution. Don’t use just SEE NOTES. Basic idea of what solution is at a minimum then pointer to the notes.
Submitter Phone	Phone number of user submitting. Use XXX-XXX-XXXX format. Use the Fill Info button to populate the rest of the info (name, e-mail, center).
Priority/Severity	Criticality of the issue. While most users want to make it Emergency or Severity 1, there are standards for each one. Please see the section entitled Severities and Priorities under Creating SR.
Submitter Name	Name of submitter (Format: LASTNAME, FIRSTNAME)
Submitter Center	Submitter’s Center
Submitter E-Mail Address	Submitter’s E-mail address
Related SIR #	If there are any SIR’s that are associated with the SR being created, it can be referenced here.
Related Vendor #	If an SR has been vendored, the vendor may assign a problem number to it. This can be referenced here.
Related TT #	If opened by the NISC, their number will be placed here.
Requested Due Date	Date user would like the issue to be resolved. This may not necessarily be the date the problem will be completed.
Release Date	Date of release that will incorporate the resolution. Release management procedures will come into play here.
Vendored	A flag that will stop the SLA clock. If an SR needs to go to a vendor for work, then check this.
On Hold	On Hold, another SLA clock stopper. This is only to be used when responsibility for the next step is outside the Competency Center, such as waiting on user response.
PY05/Prior	Flag for indicating an issue dealing with years prior to and including Program Year 05
PY06	Flag for indicating as issue dealing with Program Year 06 and forward
Center Action Plan	Flag to designate an SR/issue as part of a Center Action Plan
Year End	Indicates an SR related to year end activities.
Closed Date	Date SR was closed

Appendix B – Coordinator Tab

This tab is used by the SLM team to close tickets. Each ticket, prior to being closed, is moved to a Pending Closure status. At this point, the SLM team verifies with the user that the ticket has been closed to their satisfaction. This is done to help meet SLA customer satisfaction metrics.

This tab is visible to other Competency Center personnel as well, but only as a view.

This tab has a few key fields to assist in determining when the SLA will be met/failed. See below for a more detailed description of the fields.

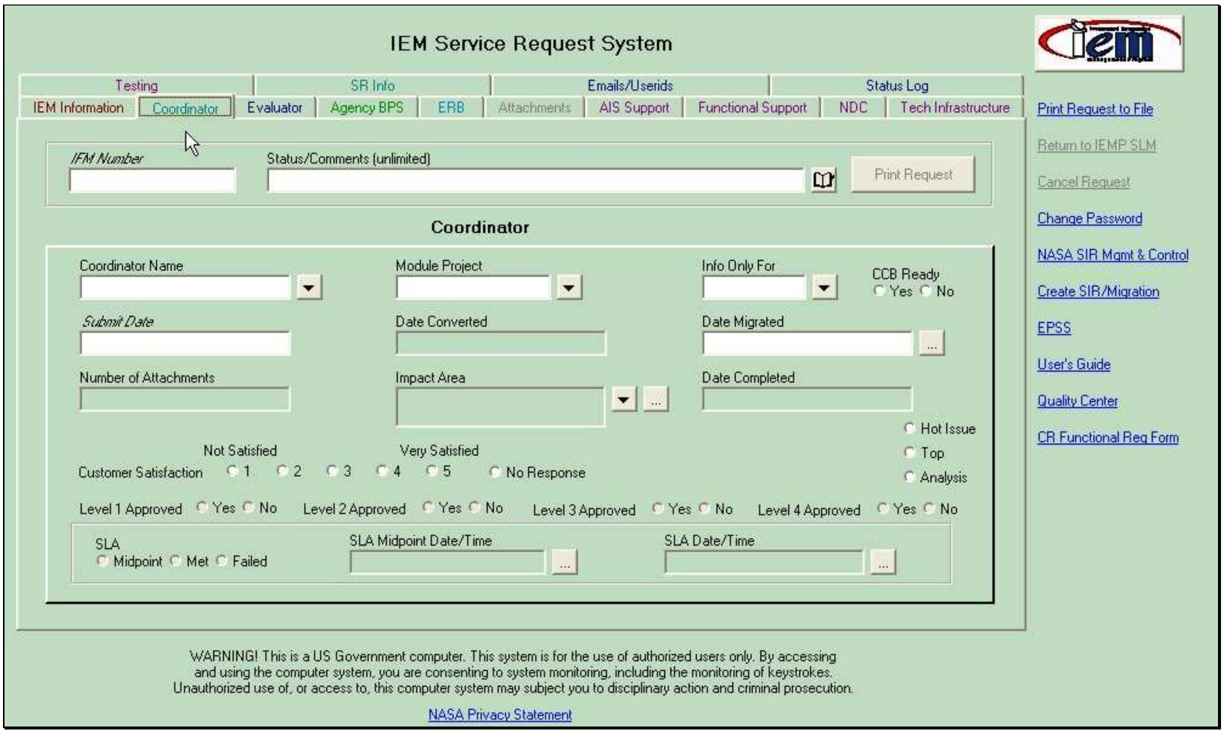


Figure B – Coordinator

While these fields are generally unavailable to users other than the SLM team, these fields can be queried using the Advanced Search capabilities.

Field Name	Description
Coordinator Name	Name of SLM Member responsible for this SR.
Submit Date	Date the SR was opened/submitted
Number of Attachments	Number of physical documents attached via the Attachments tab. This is NOT an indicator or how many changes are requested.
Module Project	Which module or project is the primary focus of the SR. Choices are BW, CF, TM, or EP
Date Converted	Date SR was converted to a Change Request from a Break/Fix

Impact Area	Primary GROUP being affected by SR. Choices are AIS Support, Functional Support, NDC, and Technical Infrastructure
Info Only For	Indicates that this SR, while impacting one area, should also be reviewed at CCB's for other groups. These informational notices can go to: BW, CF, TM, and EP.
Date Migrated	Date migrated to production
Date Completed	Date work was completed
CCB Ready	Indicates that the SR is ready to be reviewed/approved at a CCB meeting. This field is used in conjunction with the CCB Approval form
Customer Satisfaction	This field records the customer's overall satisfaction with the SR process. The SLM team contacts the submitter for EVERY Break/Fix and records this information. This information is used for metric reporting.
Level 1 Approved	Indicates approved by Level 1 CCB.
Level 2 Approved	Indicates approved by Level 2 CCB.
Level 3 Approved	Indicates approved by Level 3 CCB.
Level 4 Approved	Indicates approved by Level 4 CCB.
SLA	Service Level Agreement. This field indicates where an SR is in its 'lifecycle' and whether or not it is past the midpoint. It will also indicate if the SLA was met or failed.
SLA Midpoint Date/Time	Calculated midpoint for the SLA.
SLA Date/Time	Date and time prior to which the SLA is met. Date completed after this date indicates it failed the SLA.
Hot Issue	A flag that can be set by each center, usually the Center Business Process Lead. This is used for reporting and during meetings to keep issues on the radar screen.
Top	Each center can designate issues that are their most important to be addressed. This is also used in reporting and meetings
Analysis	Flag to indicate that further analysis is needed.

Appendix C – Evaluator Tab

The Evaluator Tab is used during Change Request (CR's). This allows the individual identified as the lead evaluator to send the CR to several different groups for assessments. The Lead Evaluator can assign the evaluation process to another individual.

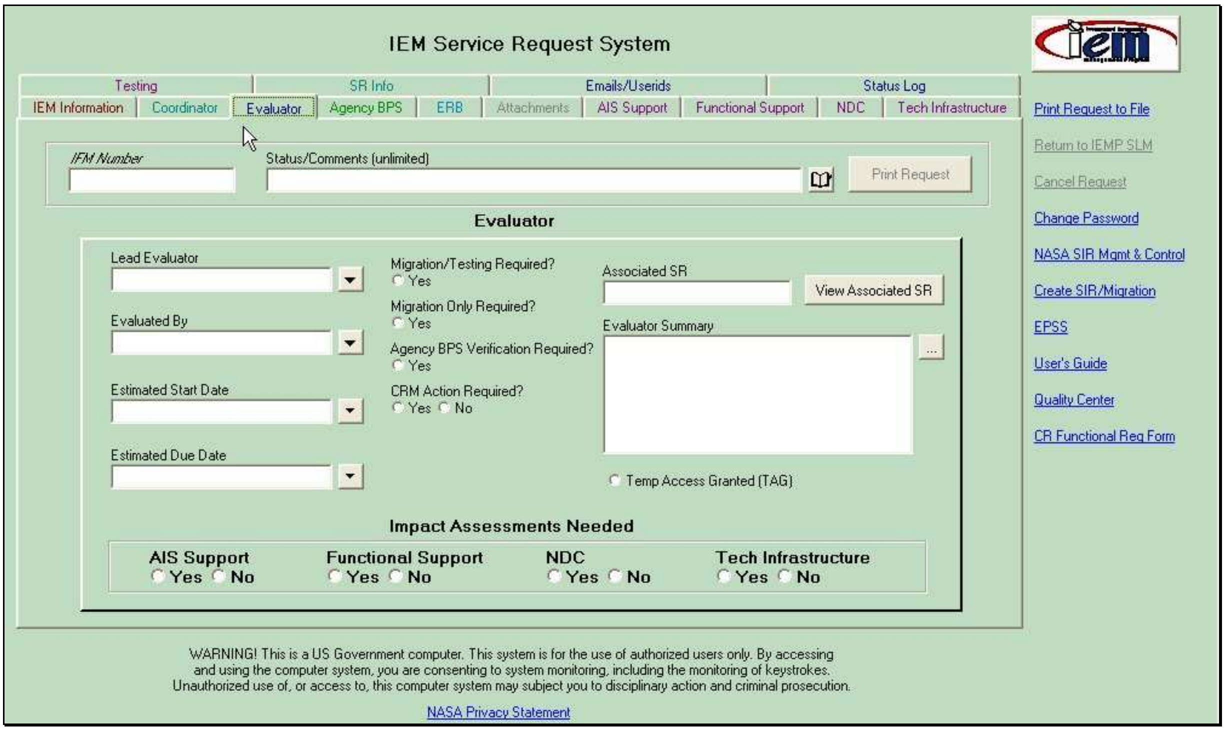


Figure C - Evaluator

Field Name	Description
Lead Evaluator	Individual designated as the one responsible for evaluation. This is determined by a combination of field selections on the IEM Information tab.
Evaluated By	Individual designated by the Lead Evaluator to do the SR evaluation. This person can specify which impact assessments are required.
Estimated Start Date	Date the SR can possibly be started for evaluation purposes.
Estimated Due Date	Date the SR can possibly have evaluations complete.
Migration/Testing Required?	SR's that involve system changes should usually have this checked. This is set to checked by default on a CR.
Migration Only Required?	SR's that do not require testing will have this flag set. If this is set, the Testing flag will NOT be set
Agency BPS Verification Required?	Flag to indicate that Agency Business Process Team needs to verify the results of the SR.
CRM Action Required?	Flag to indicate that additional support items may be needed by

	Customer Relations Management, such as training doc updates, etc.
Associated SR	If there are other SR's relating to the same issue, they can be listed here.
Evaluator Summary	Allows evaluator to outline issues of what needs to be done
Associated SR's Description	A brief description of the related SR's focus/issue.
Temp Access Granted (TAG)	A flag to indicate that temporary user access was granted to a system. Used primarily by security personnel.
Impact Assessments Needed	Indicates which groups should do an impact assessment. If a group's flag is set to No, their corresponding tab **will NOT show up** as being available.

Appendix D – ERB (Engineering Review Board) Tab

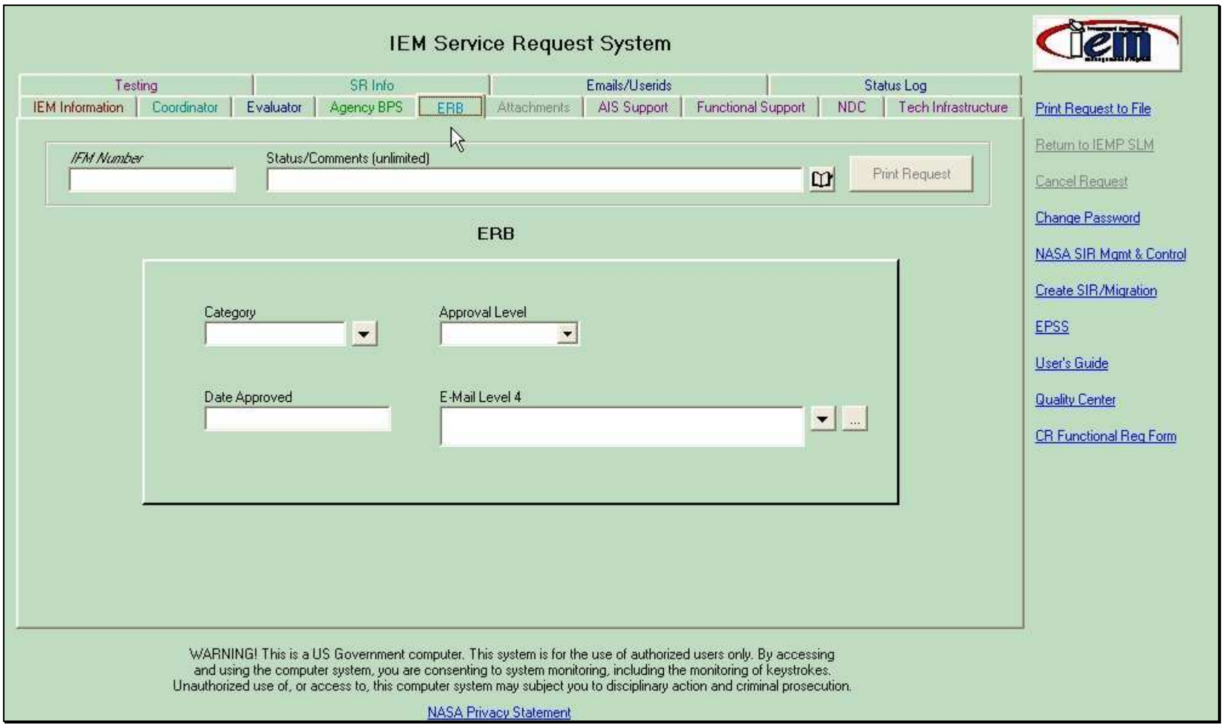


Figure D – ERB

Field Name	Description
Category	**Category 1 –** Items are of potential high-risk, may affect policies, require cross-functional or cross-agency analysis, affect the user population, and/or have a significant cost/budget impact. This category requires Level 1 CCB approval (see below). **Category 2 –** Items are of medium risk, require limited cross-functional or cross agency analysis, limited effect on the user population and/or have minimal or no cost/budget impact. This category requires Level 2 CCB approval. **Category 3 –** Items are of small risk, require no cross-functional or cross-agency analysis, have little or no effect on the user population and have no cost/budget impacts. This category requires Level 3 CCB approval. **Category 4 –** Items are of routine maintenance or require tracking for documentation purposes. This category may require Level 4 CCB approval.
Approval Level	Indicates the level of CCB review and approval required. Level 4 is for Competency Center, Level 3 is for Center Business Process Leads (CBPL's), Level 2 is for the Steering Committee, Level 1 is for NASA Deputy Administrator approval.
Date Approved	Date SR was approved by the appropriate CCB level
Email Level 4	Indicates the emails to which CCB-required approval is sent

Appendix E – Attachments Tab

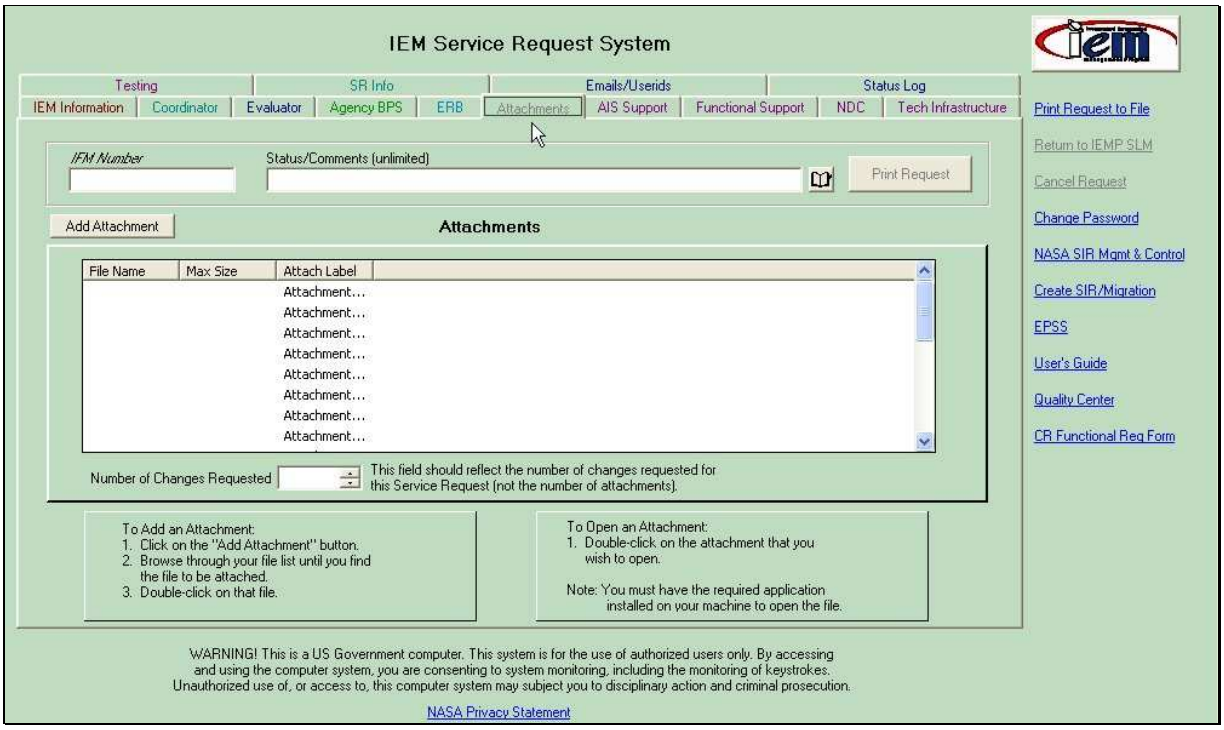


Figure E - Attachments

Field Name	Description
Attachments	Files can be of any type, 1 MB max per file, 10 MB total for all.
Number of Changes Requested	This is not the number of attachments, but rather a number that indicates the number of changes requested by this one SR. For example, a Master Data request is one request, but it may contain 1,000 changes. This field would then say 1,000. Max number is 9999.
Add Attachment button	Click the button to add an attachment.

Appendix F – AIS Support Tab

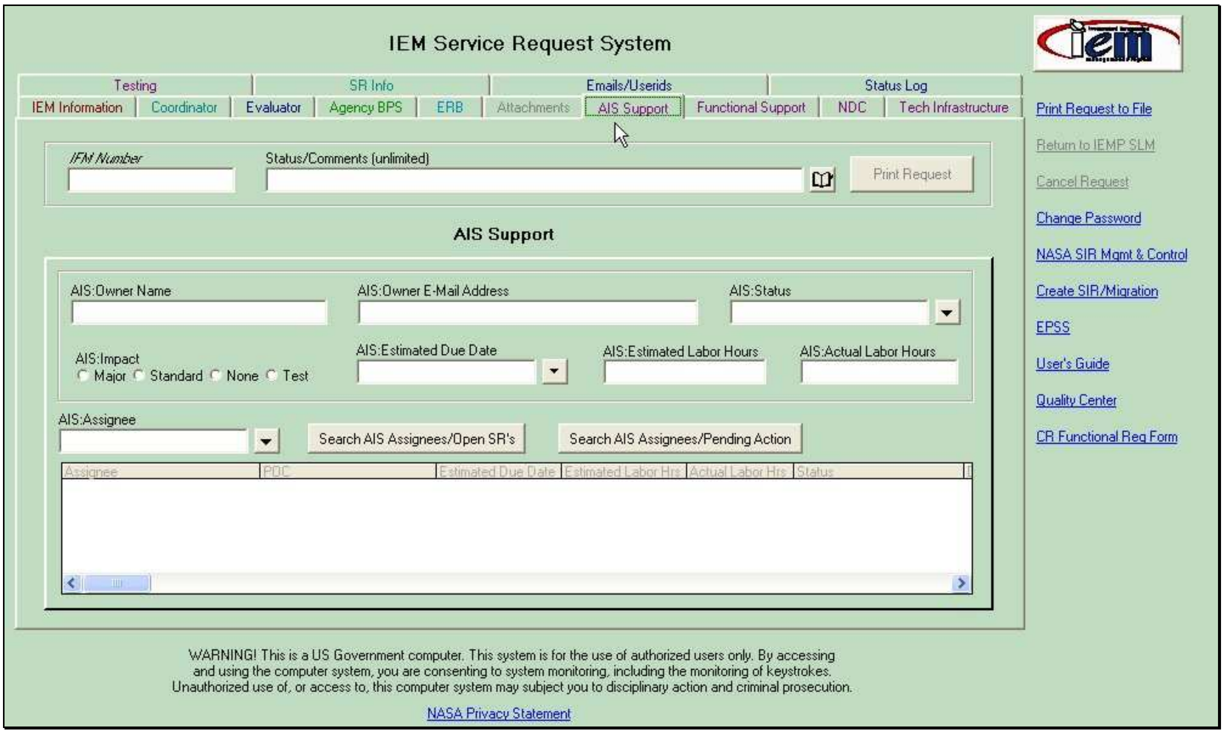


Figure F – AIS Support

Field Name	Description
Owner Name	Name of individual overseeing this group
Owner Email address	Usually a group account so multiple people are notified about
Status	Status as it relates to this group only. Options are: **Pending Assessment** – Lead has not yet assigned to a team member **Assessment Complete** – Team has completed initial impact assessments **Pending Work Assignment** – SR has been approved to be worked, but not yet assigned to a team member **Assigned to Work** – Tasking given to team member, but work has yet to begin **Work Verification** – Work has been completed and is awaiting verification that all work for completion of the SR is complete **Closed** – Work done and no further action required **No Impact** – Assessment is done but no work required for this group.
Impact	This set of choices is a reflection of how much effort is going to be required to complete the work. Major indicates a high level of

	effort (LoE); Standard indicates normal workload efforts; Test indicates that only testing needs to be done by this group; None indicates no impact at all.
Estimated Due Date	Auto-populated date that indicates the latest date provided by impact assessors.
Estimated Labor Hours	Auto-summed field that indicates the total estimated number of hours required for this group to complete their work for this SR.
Actual Labor Hours	Auto-summed field that indicates the total actual number of hours required for this group to complete their work for this SR.
Assignee	Select a member of this group from the dropdown to assign tasks to them. Up to 10 possible assignees can be listed
Assign to Work?	It is possible to specify that work is to begin immediately. This is the default value. You can also specify that a member begins work after the previous assignee completes their portion. This is beneficial when one analysis has to be completed before additional analysis can take place.
Table Information	
Assignee	Name of member assigned work
Estimated Due Date	Date member estimates their portion can be complete
Estimated Labor Hours	Hours (or portions of) estimated to be required to complete actions for the SR
Status	Indicates the status of the member working or assessing the SR.
Additional Fields – While Working SR	
Work Complete	Yes/No field. Select this when work being performed is complete.
% Complete	If work is not complete, a percentage value can be added/edited as work is getting done.
Actual Labor Hours	When working the SR (non-assessment), hours can be placed here to record the actual amount of time required to perform the work.

Appendix G – Functional Support Tab

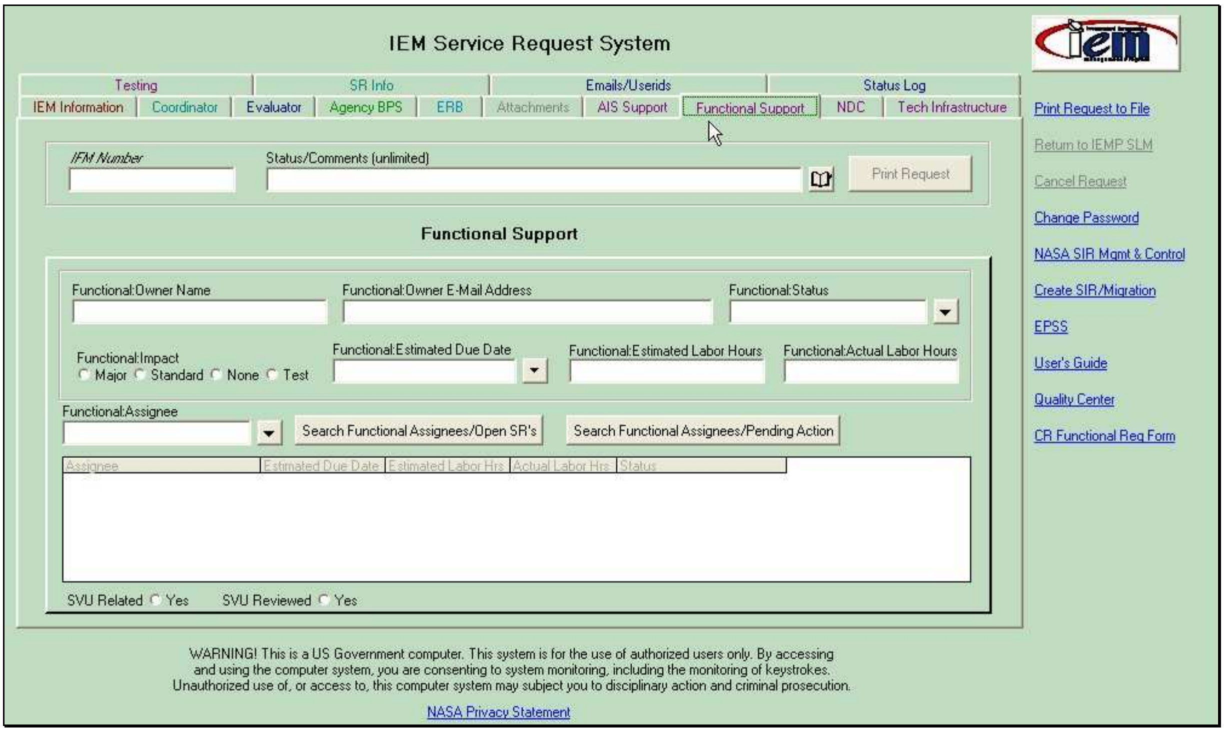


Figure G – Functional Support

Field Name	Description
Owner Name	Name of individual overseeing this group
Owner Email address	Usually a group account so multiple people are notified about
Status	Status as it relates to this group only. Options are: **Pending Assessment** – Lead has not yet assigned to a team member **Assessment Complete** – Team has completed initial impact assessments **Pending Work Assignment** – SR has been approved to be worked, but not yet assigned to a team member **Assigned to Work** – Tasking given to team member, but work has yet to begin **Work Verification** – Work has been completed and is awaiting verification that all work for completion of the SR is complete **Closed** – Work done and no further action required **No Impact** – Assessment is done but no work required for this group.
Impact	This set of choices is a reflection of how much effort is going to be required to complete the work. Major indicates a high level of effort (LoE); Standard indicates normal workload efforts; Test

	indicates that only testing needs to be done by this group; None indicates no impact at all.
Estimated Due Date	Auto-populated date that indicates the latest date provided by impact assessors.
Estimated Labor Hours	Auto-summed field that indicates the total estimated number of hours required for this group to complete their work for this SR.
Actual Labor Hours	Auto-summed field that indicates the total actual number of hours required for this group to complete their work for this SR.
Assignee	Select a member of this group from the dropdown to assign tasks to them. Up to 10 possible assignees can be listed
Assign to Work?	It is possible to specify that work is to begin immediately. This is the default value. You can also specify that a member begins work after the previous assignee completes their portion. This is beneficial when one analysis has to be completed before additional analysis can take place.
Table Information	
Assignee	Name of member assigned work
Estimated Due Date	Date member estimates their portion can be complete
Estimated Labor Hours	Hours (or portions of) estimated to be required to complete actions for the SR
Status	Indicates the status of the member working or assessing the SR.
Additional Fields – While Working SR	
Work Complete	Yes/No field. Select this when work being performed is complete.
% Complete	If work is not complete, a percentage value can be added/edited as work is getting done.
Actual Labor Hours	When working the SR (non-assessment), hours can be placed here to record the actual amount of time required to perform the work.

Appendix H – NDC Tab

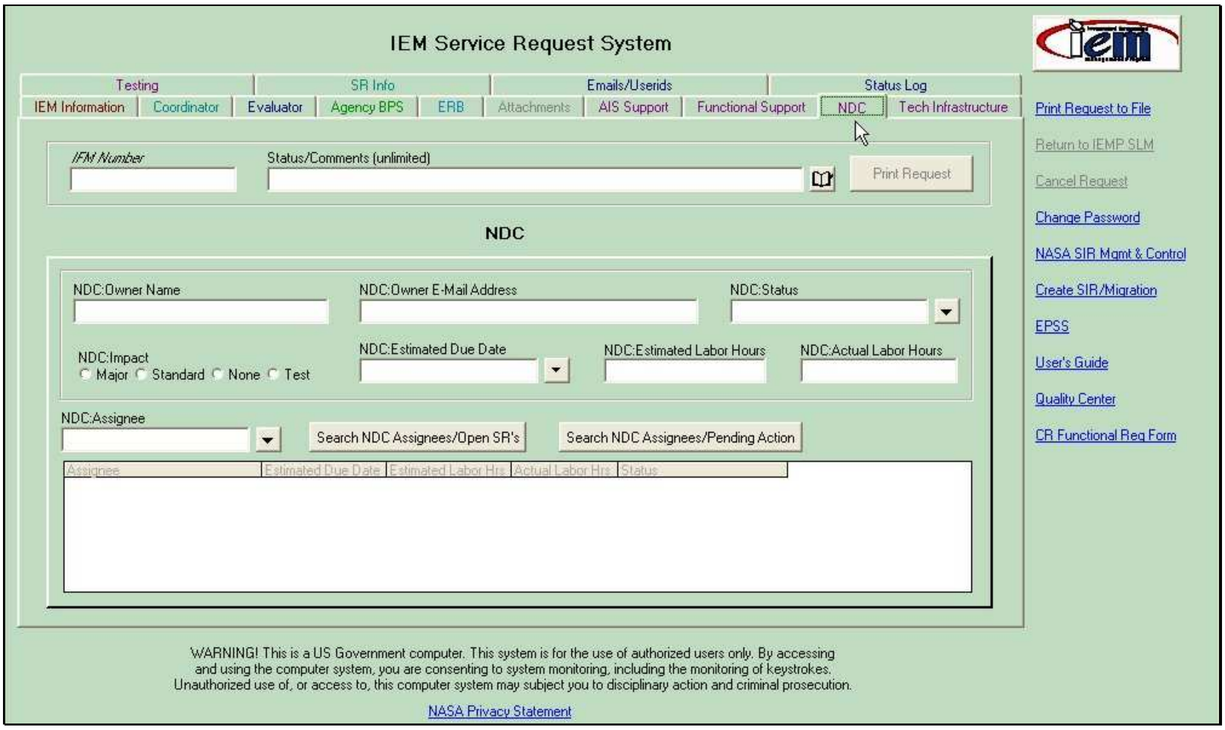


Figure H – NDC

Field Name	Description
Owner Name	Name of individual overseeing this group
Owner Email address	Usually a group account so multiple people are notified about
Status	Status as it relates to this group only. Options are: **Pending Assessment** – Lead has not yet assigned to a team member **Assessment Complete** – Team has completed initial impact assessments **Pending Work Assignment** – SR has been approved to be worked, but not yet assigned to a team member **Assigned to Work** – Tasking given to team member, but work has yet to begin **Work Verification** – Work has been completed and is awaiting verification that all work for completion of the SR is complete **Closed** – Work done and no further action required **No Impact** – Assessment is done but no work required for this group.
Impact	This set of choices is a reflection of how much effort is going to be required to complete the work. Major indicates a high level of effort (LoE); Standard indicates normal workload efforts; Test indicates that only testing needs to be done by this group; None indicates no

	impact at all.
Estimated Due Date	Auto-populated date that indicates the latest date provided by impact assessors.
Estimated Labor Hours	Auto-summed field that indicates the total estimated number of hours required for this group to complete their work for this SR.
Actual Labor Hours	Auto-summed field that indicates the total actual number of hours required for this group to complete their work for this SR.
Assignee	Select a member of this group from the dropdown to assign tasks to them. Up to 10 possible assignees can be listed
Assign to Work?	It is possible to specify that work is to begin immediately. This is the default value. You can also specify that a member begins work after the previous assignee completes their portion. This is beneficial when one analysis has to be completed before additional analysis can take place.
Table Information	
Assignee	Name of member assigned work
Estimated Due Date	Date member estimates their portion can be complete
Estimated Labor Hours	Hours (or portions of) estimated to be required to complete actions for the SR
Status	Indicates the status of the member working or assessing the SR.
Additional Fields – While Working SR	
Work Complete	Yes/No field. Select this when work being performed is complete.
% Complete	If work is not complete, a percentage value can be added/edited as work is getting done.
Actual Labor Hours	When working the SR (non-assessment), hours can be placed here to record the actual amount of time required to perform the work.

Appendix I – Tech Infrastructure Tab

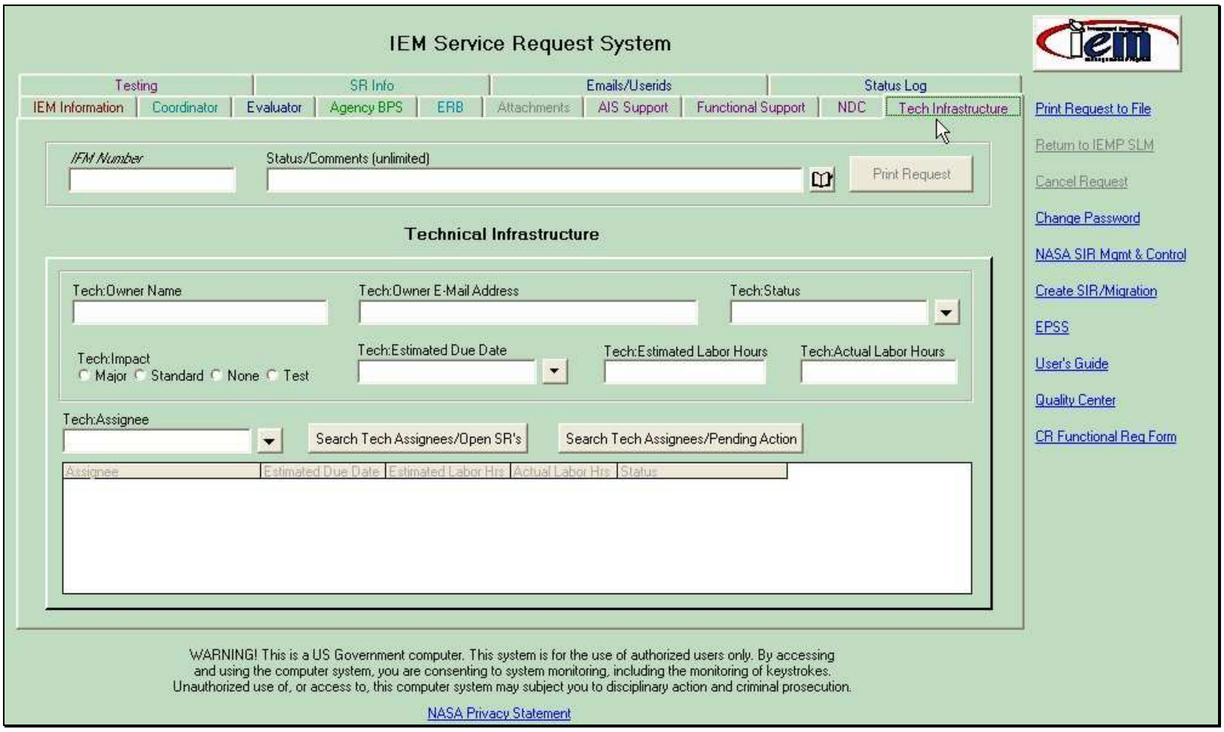


Figure I – Tech Infrastructure

Field Name	Description
Owner Name	Name of individual overseeing this group
Owner Email address	Usually a group account so multiple people are notified about
Status	Status as it relates to this group only. Options are: **Pending Assessment** – Lead has not yet assigned to a team member **Assessment Complete** – Team has completed initial impact assessments **Pending Work Assignment** – SR has been approved to be worked, but not yet assigned to a team member **Assigned to Work** – Tasking given to team member, but work has yet to begin **Work Verification** – Work has been completed and is awaiting verification that all work for completion of the SR is complete **Closed** – Work done and no further action required **No Impact** – Assessment is done but no work required for this group.
Impact	This set of choices is a reflection of how much effort is going to be required to complete the work. Major indicates a high level of effort (LoE); Standard indicates normal workload efforts; Test

	indicates that only testing needs to be done by this group; None indicates no impact at all.
Estimated Due Date	Auto-populated date that indicates the latest date provided by impact assessors.
Estimated Labor Hours	Auto-summed field that indicates the total estimated number of hours required for this group to complete their work for this SR.
Actual Labor Hours	Auto-summed field that indicates the total actual number of hours required for this group to complete their work for this SR.
Assignee	Select a member of this group from the dropdown to assign tasks to them. Up to 10 possible assignees can be listed
Assign to Work?	It is possible to specify that work is to begin immediately. This is the default value. You can also specify that a member begins work after the previous assignee completes their portion. This is beneficial when one analysis has to be completed before additional analysis can take place.
Table Information	
Assignee	Name of member assigned work
Estimated Due Date	Date member estimates their portion can be complete
Estimated Labor Hours	Hours (or portions of) estimated to be required to complete actions for the SR
Status	Indicates the status of the member working or assessing the SR.
Additional Fields – While Working SR	
Work Complete	Yes/No field. Select this when work being performed is complete.
% Complete	If work is not complete, a percentage value can be added/edited as work is getting done.
Actual Labor Hours	When working the SR (non-assessment), hours can be placed here to record the actual amount of time required to perform the work.

Appendix J – Agency BPS Tab

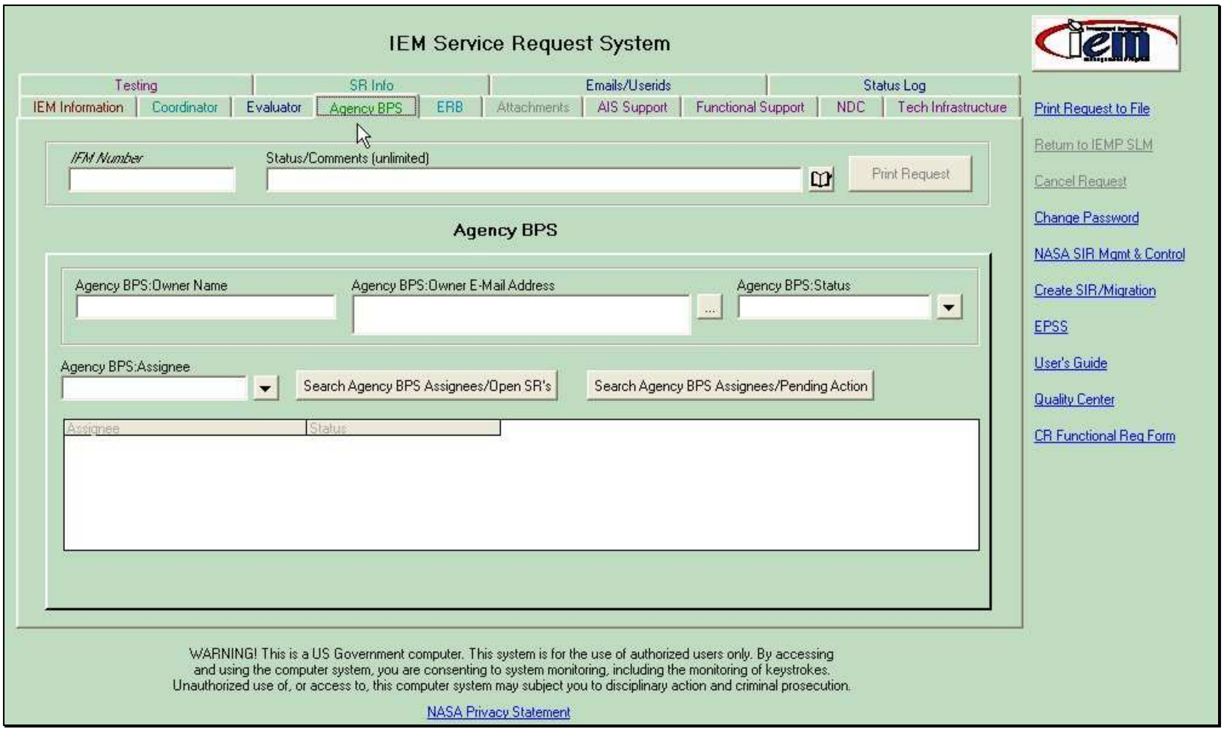


Figure J – Agency BPS

Field Name	Description
Owner Name	Name of individual overseeing this group
Owner Email address	Usually a group account so multiple people are notified about
Status	Status as it relates to this group only. Options are: **Pending Assignment –** Lead has not yet assigned to a team member **Pending Assessment –** Assigned to member of OCFO, but has not been assessed. **Assessment Complete –** Team has completed initial impact assessments **Approved –** SR approved by OCFO **Disapproved –** SR denied by OCFO
Assignee	Select a member of this group from the dropdown to assign tasks to them.
Table Information	
Assignee	Name of member assigned work
Status	Indicates the status of the member working or assessing the SR.

Appendix K – Testing Tab

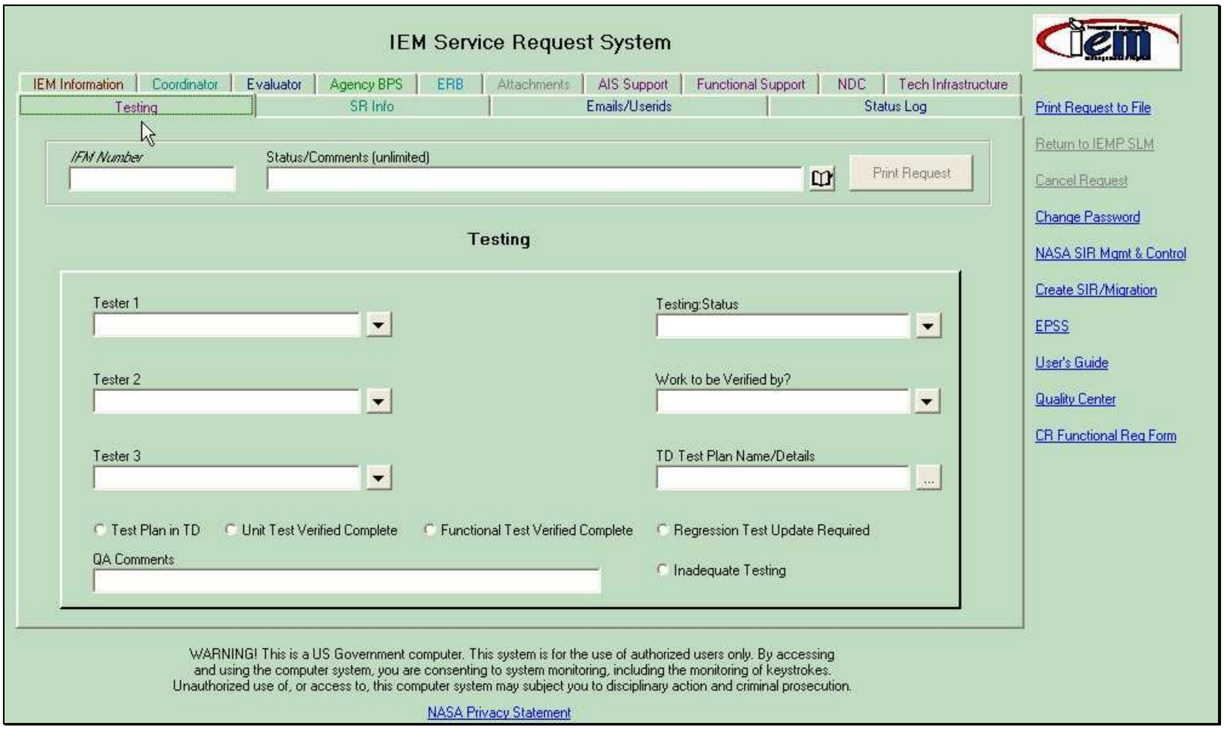


Figure K - Testing

Field Name	Description
Tester 1 (2 and 3)	Each of these fields has a list of testers to be selected. At this point, you can specify up to three testers (1 per field)
Testing Status	Lists the progress of the testing for the SR. Possible values: **Pending Test Assignment** – Testing ready to be done, but awaiting assignment **Testing in Process** – Testing has been assigned and is underway **Testing Complete** – Testing has been completed, but success/failure has not been assessed **Test Failed/Requirement not met** – Testing done, but results did not meet requirements for the SR **Test Failed/Requirement change** – Testing failed due to requirements having changed **No Testing Required** – Testing was selected as needed, but it ended up not needing to be done
Work to be Verified by?	Dropdown listing possible testers and verifiers
TD Test Plan Name/Details	The detailed name in Test Director of the test plan

	being used to test and validate items in the SR
Test Plan in TD	Checkbox to show that a valid test plan is loaded in Test Director
Unit Test Verified Complete	Checkbox to show that unit testing has been completed
Functional Test Verified Complete	Checkbox to show that functional testing has been completed
Regression Test Update Required	Checkbox to indicate that updates to the regression testing in Test Director are required as a result of this SR
Inadequate Testing	Checkbox to indicate that testing was not sufficient enough to validate the SR’s requirements, functionality, and/or regression test
QA Comments	Quality Assurance comments can be added here

Appendix L – Emails/User IDs Tab

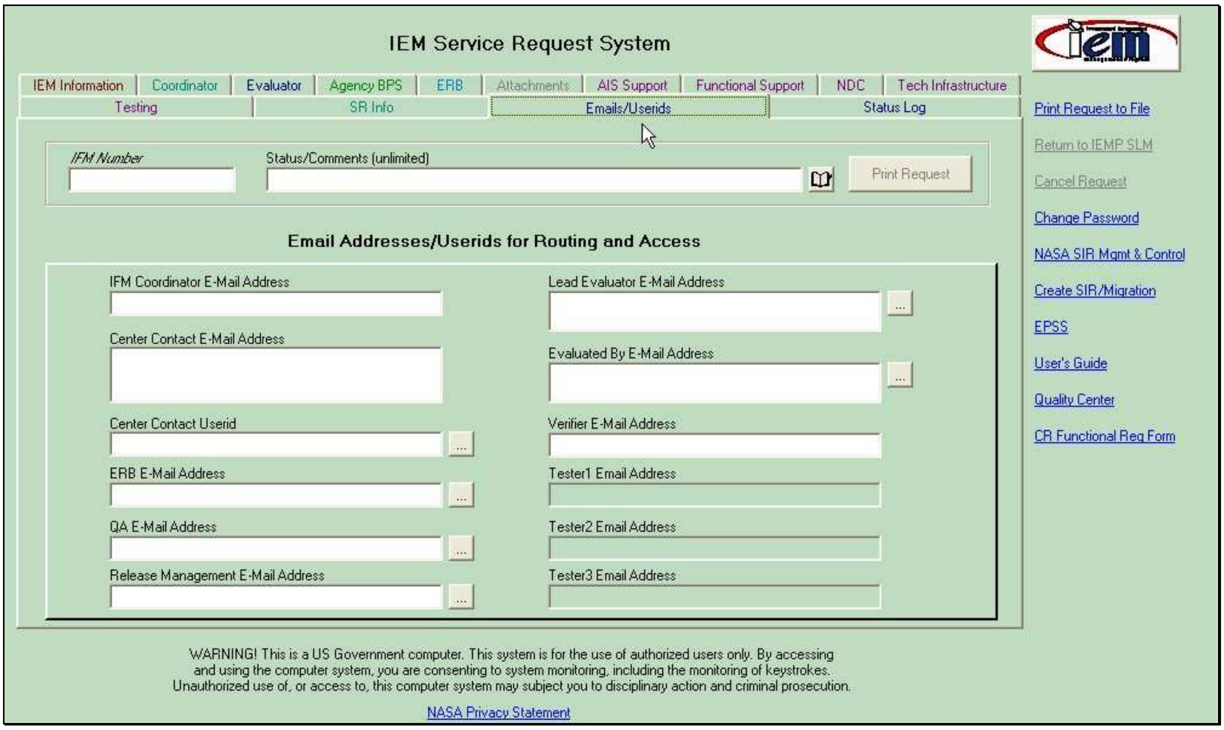


Figure L – Emails/User IDs

This tab, not normally visible, lists emails for key users associated with the SR in question.

Appendix M – Status Log Tab

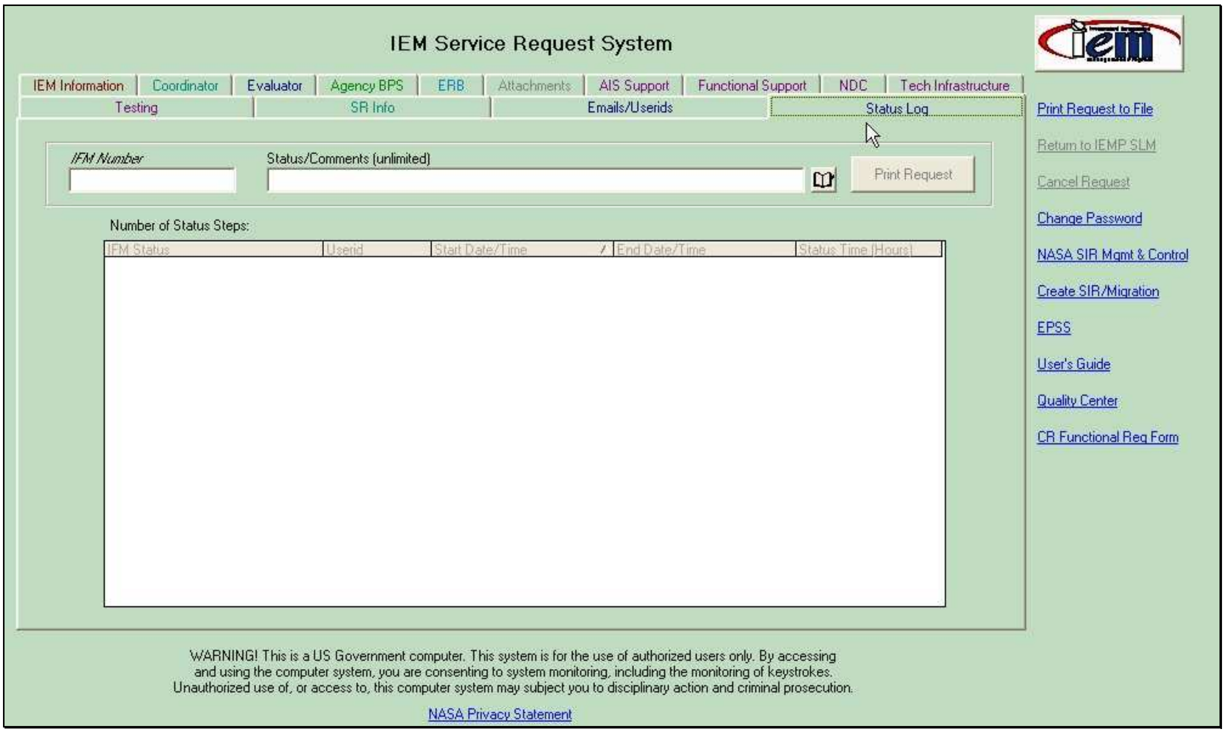


Figure M – Status Log

This tab lists shows a history of the status of the SR through out its life, from submission to the present.

Appendix N – SR Info Tab

This tab is a point of reference to include other groups in this SR. While their input is not directly required for the effort in SR resolution, their attention may be needed as a result of the SR.

These actions help ensure all supporting information, such as OLQR updates, test cases, training documentation, etc are updated to reflect any changes a particular SR may introduce into a system.

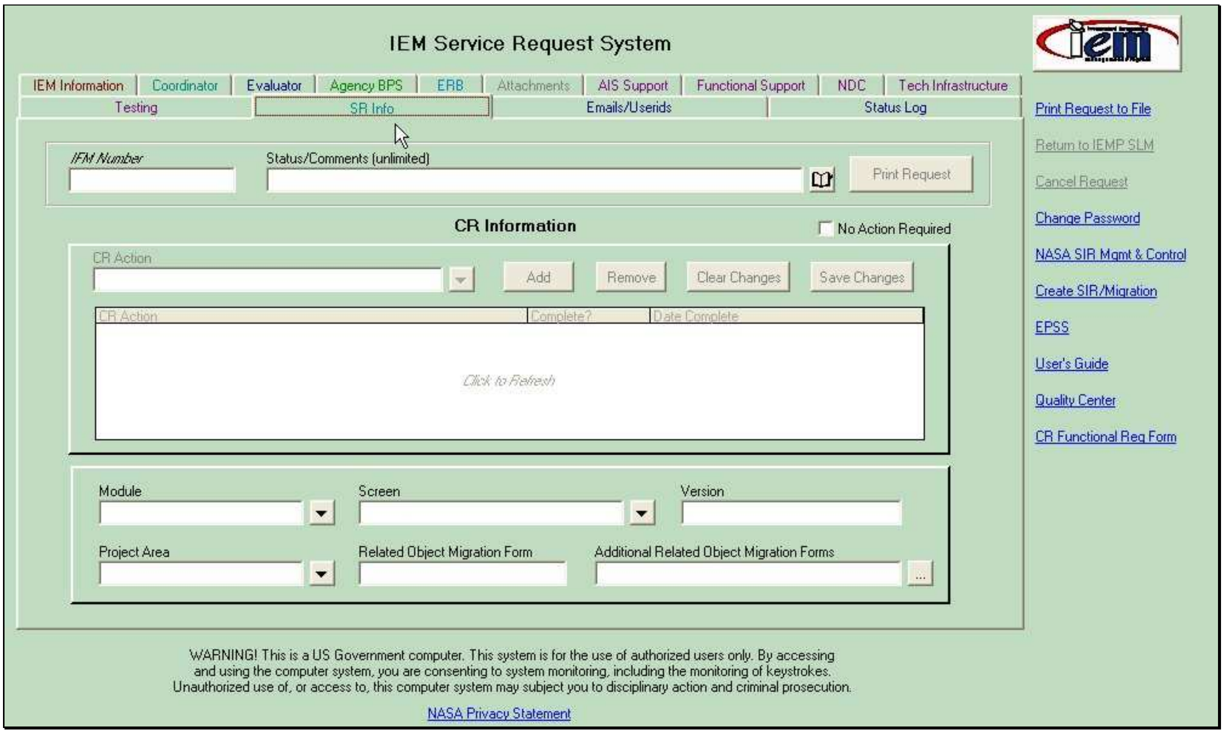
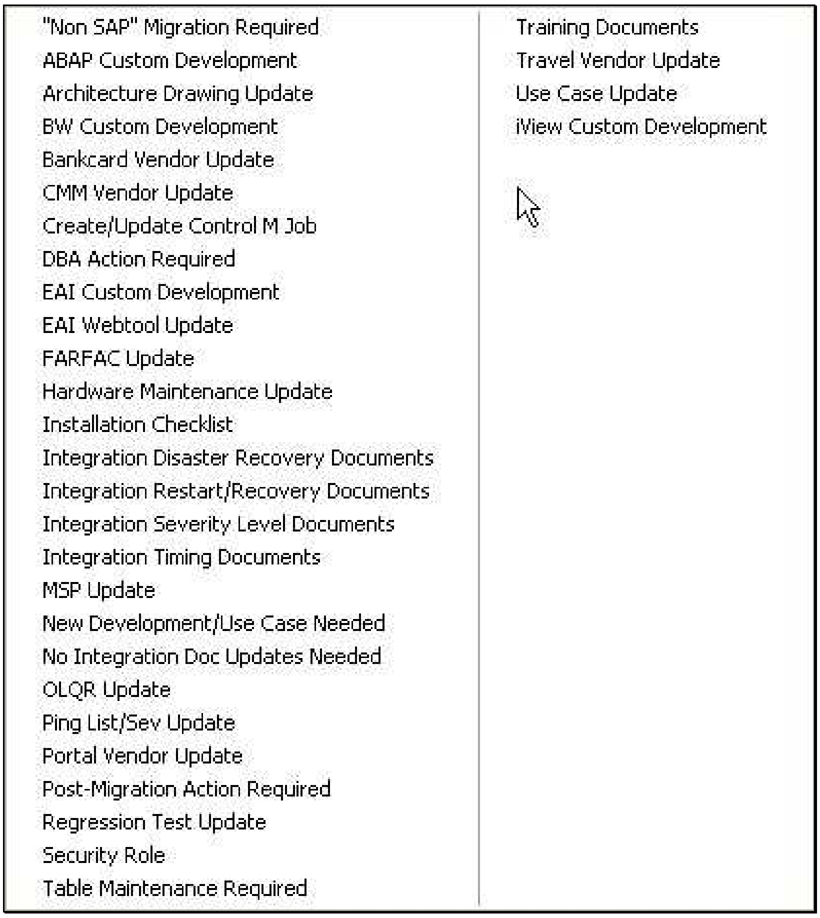


Figure N – SR Info

Field Name	Description
No Action Required	States no additional work is required by other groups
CR Action Dropdown	A dropdown that allows the user to select from a variety of updates shown in the figure below. Each option will send an email to the responsible groups or individuals so their input can be added or their actions can be completed.
CR Action List	This will list any actions selected from the dropdown above. ALL must be marked as complete before the SR can be closed.

Module	Indicates which ‘area’ needs the updating
Screen	Indicates which screen in support system needing to be updated
Version	Indicates the version to be updated or what it may change to.
Project Area	Primary application being affected by the SR
Related Object Migration Form	Number generated by MDM when an object migration is created for transport. Only 1 number should be in this field.
Additional Related Object Migration Forms	Numbers generated by MDM when an object migration is created for transport



CR Action Choices

Appendix O – Impact Overview Tab

This tab is a point of reference to indicate actions required by the various teams (AIS, Functional, NDC, Tech Infrastructure). The only field that can be edited on this tab is the Status/Comments field. All others are for reference only.

This tab will display once a SR has been sent for Impact Assessment.

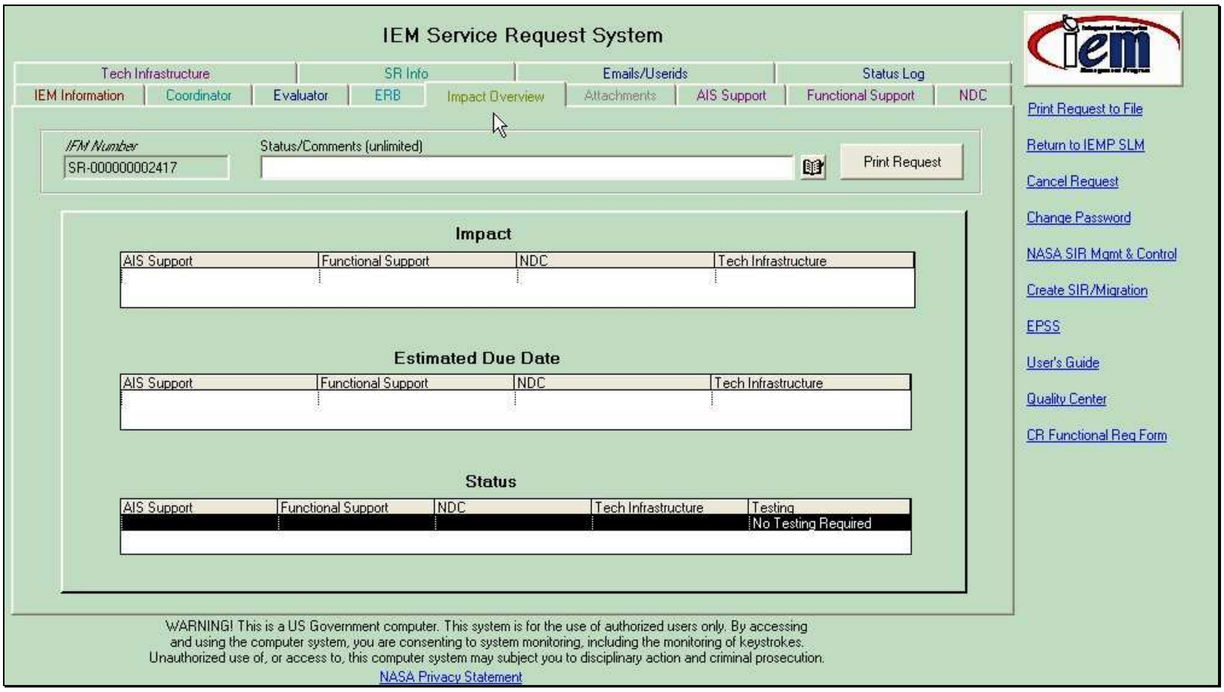


Figure O – Impact Overview

Field Name	Description
Impact	Lists impacts by teams
Estimated Due Date	Lists dates work is expected to be completed
Status	Lists the status for each team affected by the SR.

Appendix P – Moving tickets from the Competency Center

There are instances when a ticket is dispatched to the Competency Center from outside sources such as the NISC or another center. When received, it is researched and handled accordingly. Sometimes, however, those requests have solutions outside the scope of the Competency Center. While they may affect or be related to IEM, the solution lies with another group.

The IEM Service Request should not be closed, but should instead be labeled as Vendored, and sent to the appropriate group. To accomplish this, follow the procedure outlined below.

1. Notify a member of Service Level Management about a ticket needing to be returned to the NISC. This can be accomplished via email or by using the link on the right of the IEM Information Tab – Return to IEMP PCO.

Figure P1 - Return

2. An explanation should be entered into the diary containing the following information:

   a. Who is requesting it be returned.
   b. Who the ‘parent’ request should be routed to.
   c. Any information determining what work needs to be performed (See figure below)

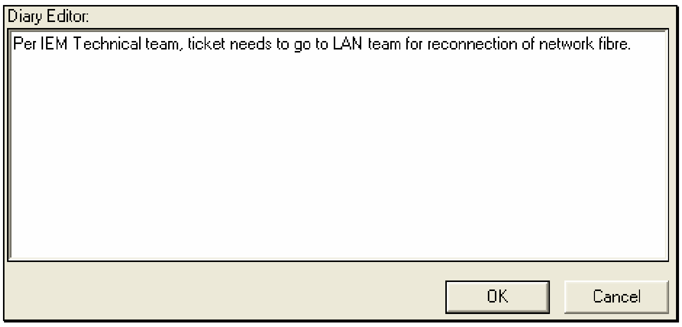


Figure P2 – Entering SR Return information into the Diary…

3. Copy this information into the resolution field.

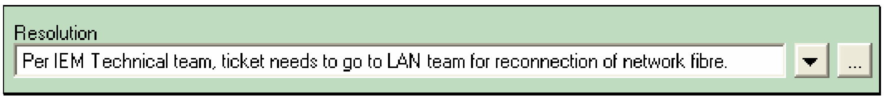


Figure P3 – … and enter it into the Resolution field

4. At this point, everything is complete. The SLM team will then click a Return to NISC link on the Service Request IEM Information tab.

Figure P4 – Return it

The service request is still open at this point, but the status is changed to Vendored. This will allow SLM personnel to continue tracking the progress to help ensure the issue is resolved, even though work is being performed by an external entity.

Appendix Q – Agency BPS Approval Process

Within the SR routing, there are certain combinations requiring Agency Business Process approval.

When an SR is opened that requires Agency BPS approval, the Center Business Process lead (CBPL) must first approve it to get it into the system. Once the CBPL approves and confirms that the center wants what is specified in the SR, they click the ***Send for Agency BPS Approval*** button. When pressed, the SR is set to “Pending Agency BPS Approval”

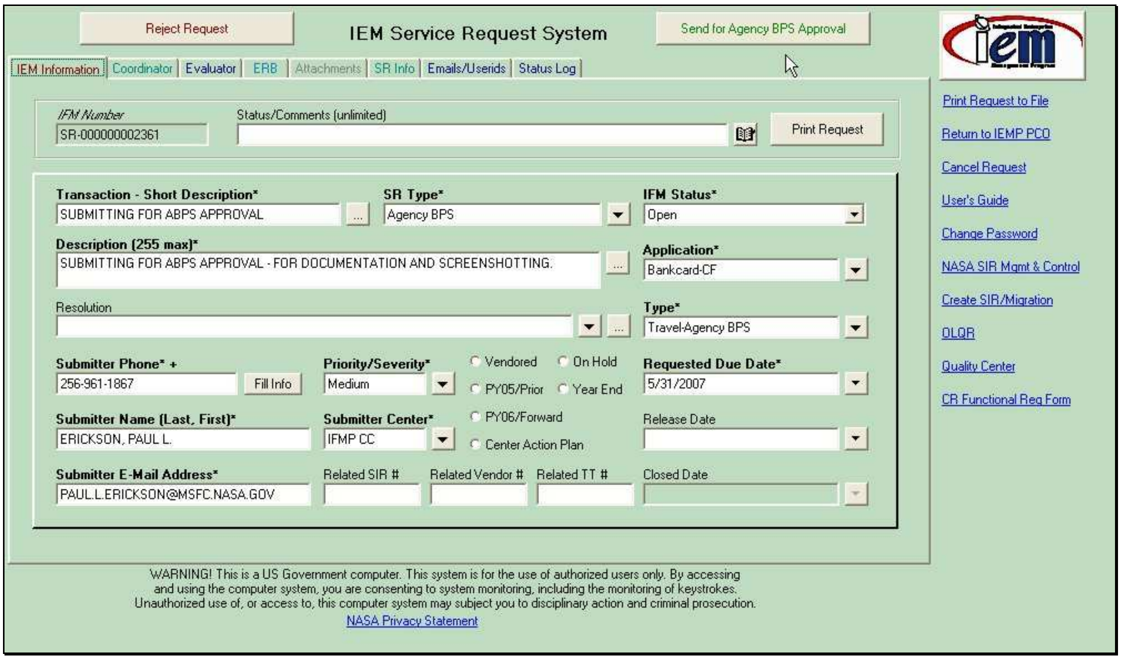


Figure Q1 - Center BPL will see the screen above. When button is pressed…

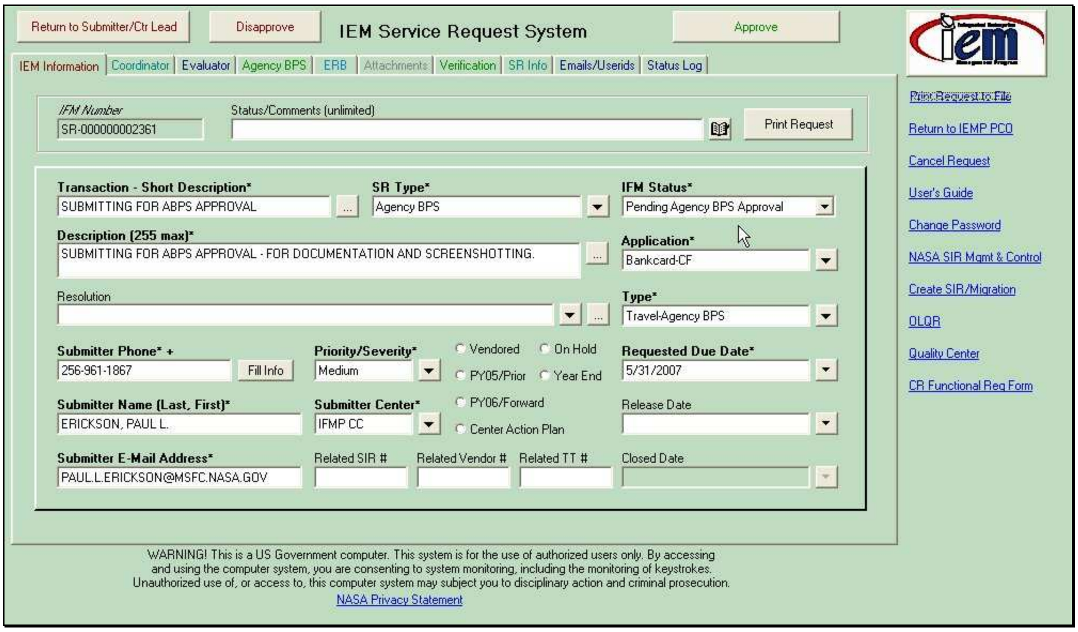


Figure Q2 – … this screen appears and is ready for ABPS work to be performed.

Now the SR is ready for ABPS assessment. Click on the *Agency BPS* tab.

Figure Q3 – Click the Agency BPS Tab.

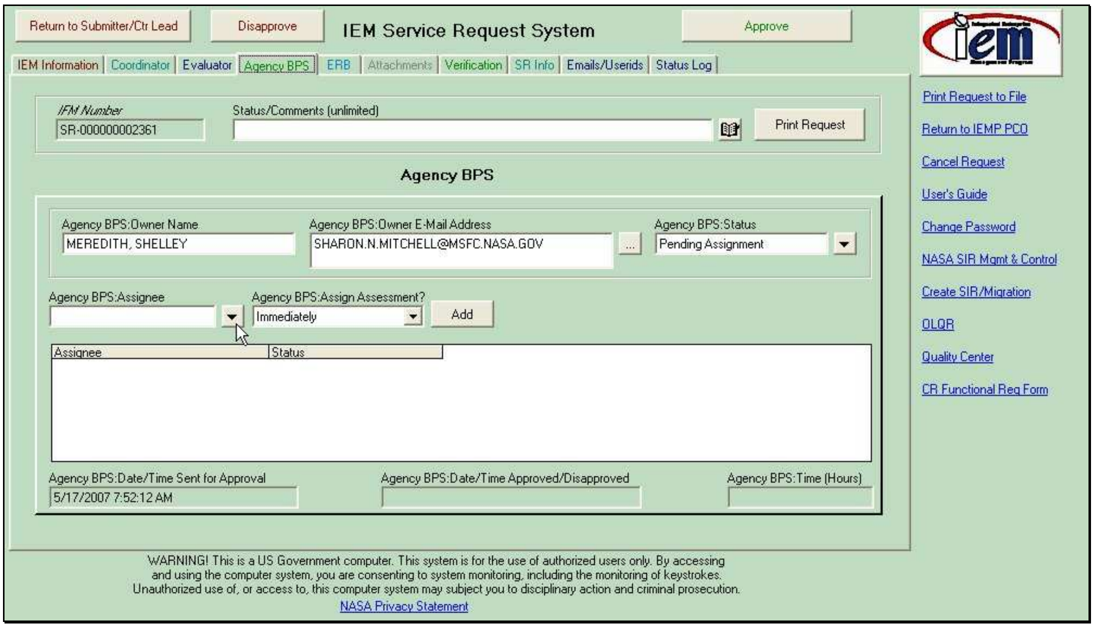


Figure Q4 – Ready to assign Agency BPS personnel to assess.

Click the dropdown arrow next to Agency BPS Assignee to see the list of assignees from which to choose.

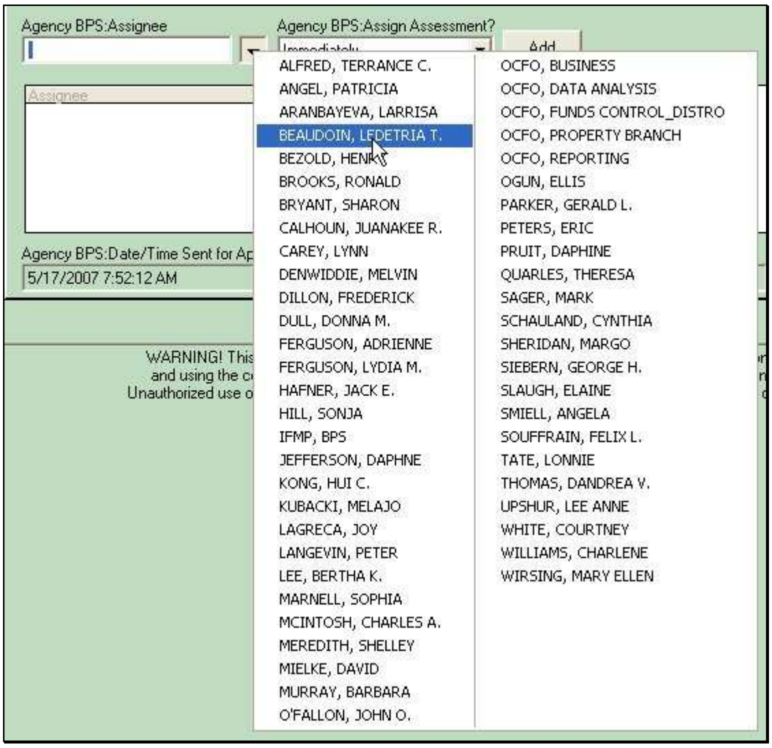


Figure Q5 – Select from the dropdown…

Click the Add button to formally assign the assessment. Select the person/team to which the assessment shall be assigned and the name will appear in the Assignee box. More than one member or group may be assigned to perform assessment duties.

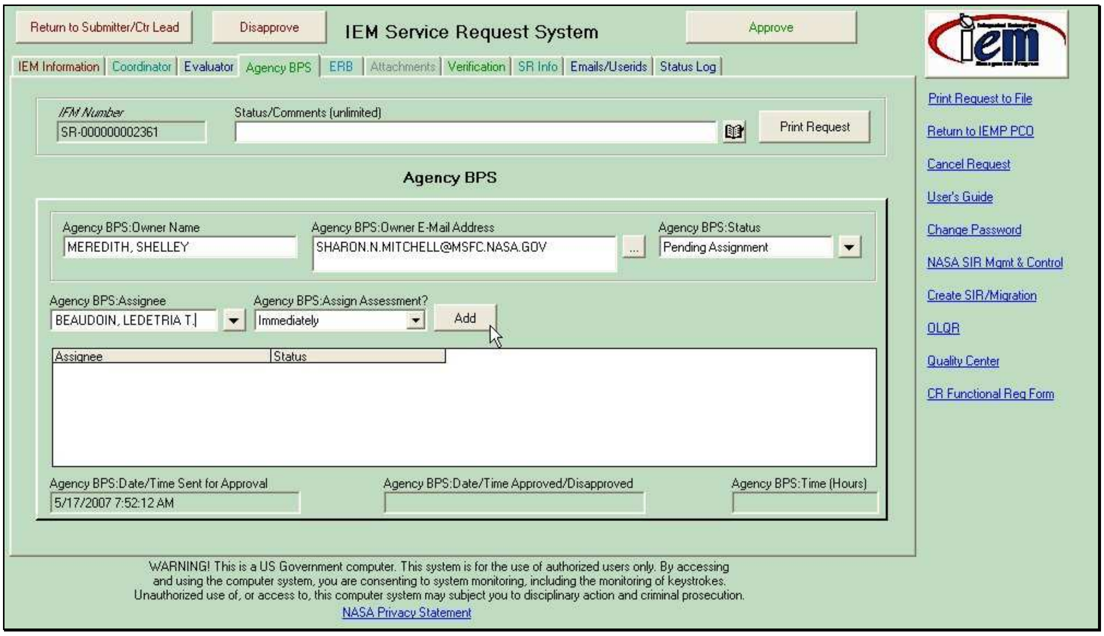


Figure Q6 – Assignee

The assignee(s) will be notified that an Agency BPS assessment is awaiting their input.

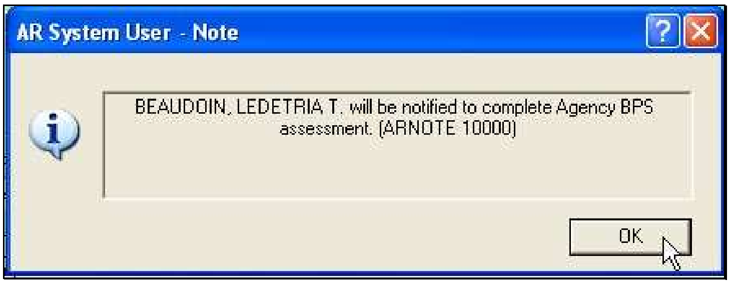


Figure Q7 – Notification

When the user(s) complete(s) their assessment(s), which may include using attachments (see Appendix E for information on Attachments), they will use the Agency BPS tab and mark their assessment as complete, as shown below.

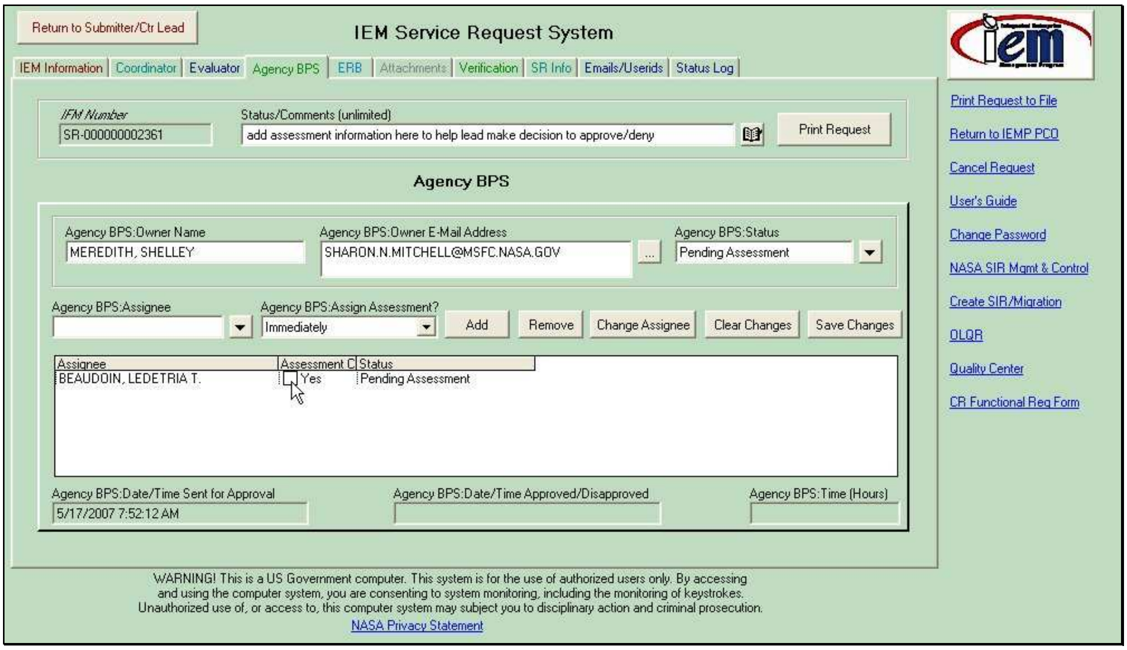


Figure Q8 – Marking Assessment Complete

The assessor shall click the ***Save Changes*** button to indicate that the completed assessment is ready to be approved. In the figure below, the Save changes is about to be pressed.

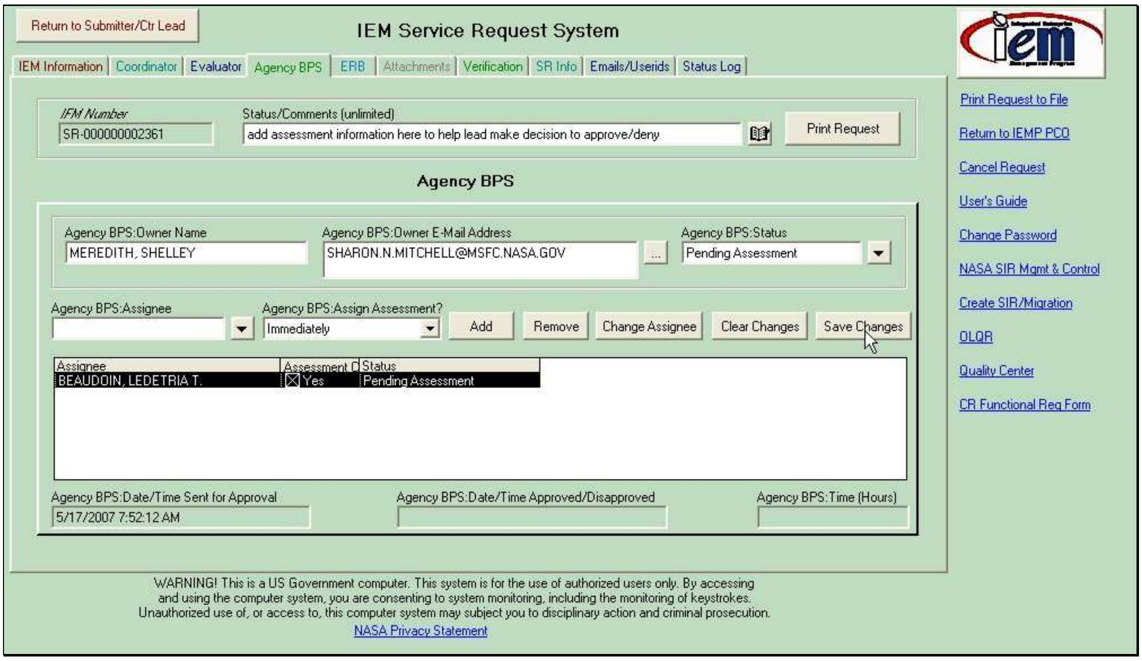


Figure Q9 – Saving changes to Assessment

Once all assessment assignees have marked their assessment complete and saved the changes the SR is ready to be dispositioned. The Agency BPS representative who makes the decision has three (3) choices:

1. **Return to Submitter/Center Lead –** this may be used to request additional clarification without disapproving the request
2. **Disapprove –** Denying the SR is to be performed.
3. **Approve –** This will send the SR along to the Competency Center for development/testing/implementation, etc.

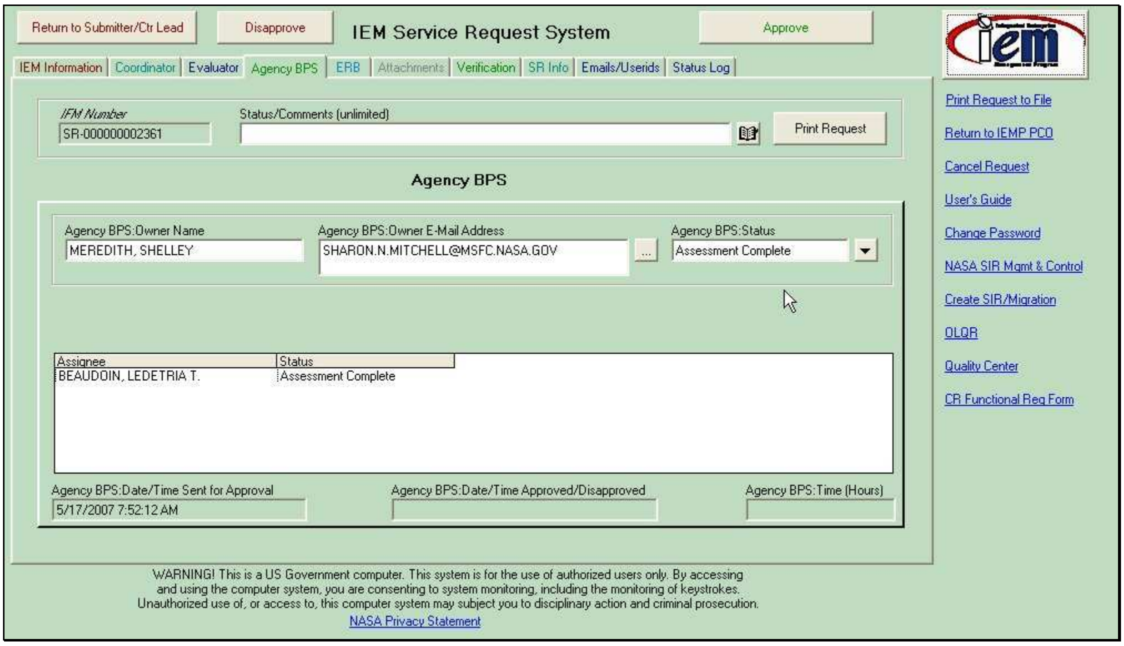


Figure Q10 – Assessment Complete, ready for final dispositioning from Agency BPS

In the figure below, the SR is being approved.

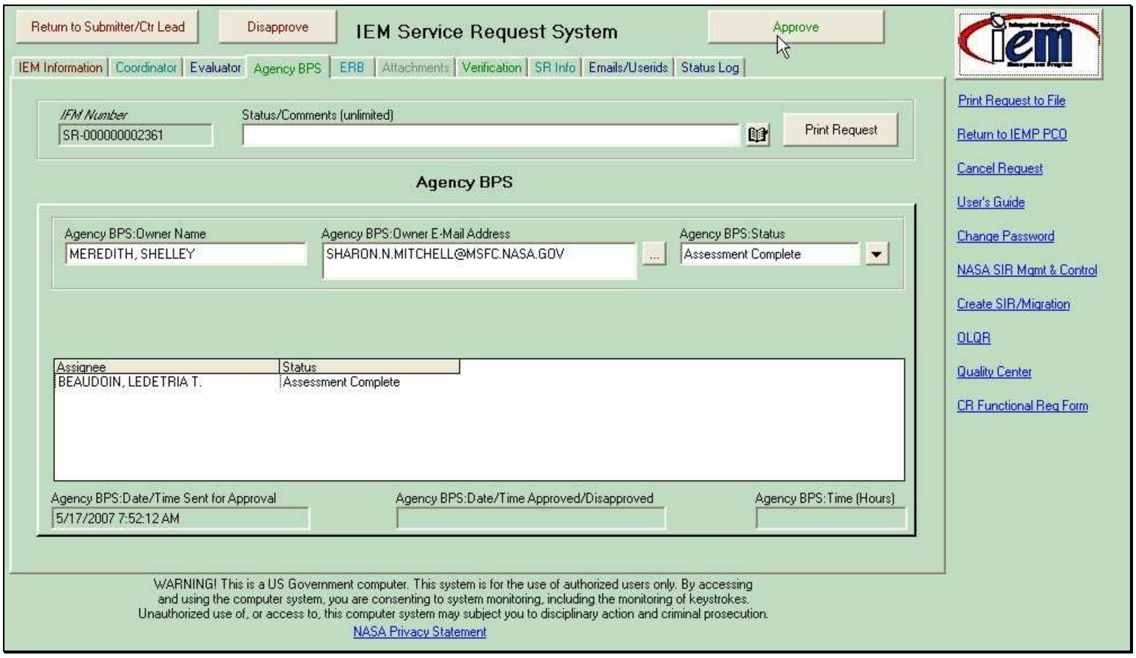


Figure Q11 – Ready to Approve

Once an SR has been approved by the Agency BPS, it is ready to be evaluated by the Competency Center for further development, testing, and implementation. No further action for this SR is required by the Agency BPS.

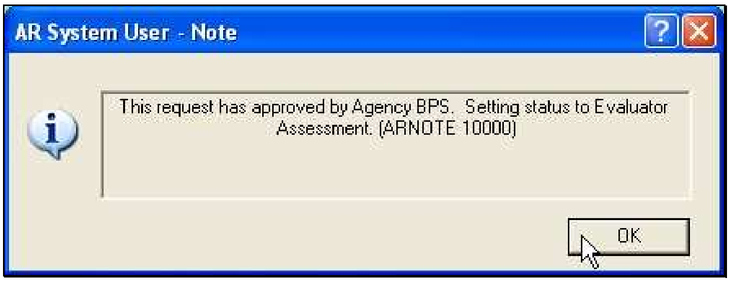


Figure Q12 – Ready for Competency Center work

Appendix R – Customizing User/Server

Adding the user and server information contained in this section is NOT required. At any time while logging in to Remedy, you have the option of manually typing in your user ID and the server to which you would like to connect.

This section is meant as a means for customizing your Remedy setup on your desktop only, to make accessing multiple servers easier.

Adding a User

1. **Select Tools/ *Account.*** The Account dialog box appears.

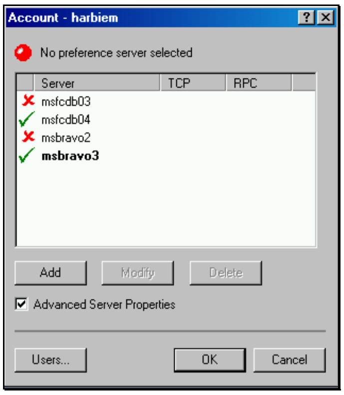


Figure R1 – Account Window

2. **Click** the **Users** button.
3. In the Users list, **click** the **Add** button.
4. **Type** the user ID (account name) of the user you want to add and **click OK**. The new user appears in the list of users.
5. The new user is automatically assigned the default AR System Home folder. You will need to change this folder if it is not correct for your setup.
6. The user is also connected to the servers that are defined for the Default User. You can change this list for the new user.
7. **Click OK** twice to close the Account window.
8. You must log in again to enable the new user to use the tool. To do this: **Select Tools/ *Login***.
9. The Login dialog box appears (Figure 3).

Figure R2 – Login Window

10. **Type** your *User Name* and *Password*. Please note: you should not enter anything in the fields marked **Preference Server** and **Authentication**.
11. **Click OK**.

Adding a Server

If you are a user of the development server as well as the production system, you may need to add a server definition for MSBRAVO3 (Please note that all users who share your AR System Home folder will also have access to this server). Follow the steps below to perform this.

1. **Select Tools/*Account***. The Account dialog box appears. See figure 2.
2. **Click** the **Add** button to add new server.
3. **Type** the new server name and **press** [Enter]. The server name must be a known name on the network. Example: msbravo3.
4. To connect the server with the Remedy User or Remedy Alert tools, ensure that a green check mark is visible next to the server name.
5. A green check mark indicates the server connection with Remedy tools. A red x mark indicates the connection with Remedy tools failed.
6. **Click OK**.
7. You must re-login to activate the changes. To do this: **Select Tools/*Login***. The Login dialog box appears. See figure 3.
8. **Type** your *User Name* and *Password*.
9. **Click OK**.